

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

ABSTRACT

This project focuses on designing and implementing a customized Salesforce CRM for HandsMen Threads, a premium brand specializing in men's fashion and tailoring. The main goal is to organize essential business processes, enhance customer interaction, and keep data reliable and consistent across different departments.

To achieve this, a structured data model was developed using five custom objects—Customer, Order, Product, Inventory, and Marketing Campaign. Automation tools like Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex code were integrated into the system to streamline tasks such as order confirmation emails, loyalty program updates, and low-stock notifications.

Data accuracy was ensured through carefully built validation rules, while security and access control were strengthened using a role-based hierarchy. Apex batch processing was also implemented to automatically monitor and update products with low stock.

Overall, this CRM solution improves day-to-day operations, supports personalized customer engagement, and establishes a solid foundation for future expansion using the Salesforce Platform.

OBJECTIVE

The main aim of this project is to create a tailored Salesforce CRM system that supports the business workflow of HandsMen Threads. Specifically, it seeks to:

- Centralize customer, product, order, inventory, and marketing data.
- Automate repetitive processes like order confirmations, stock alerts, and loyalty updates.
- Ensure clean and consistent data using validation rules and controlled access.
- Provide real-time visibility of inventory levels and customer activity.
- Strengthen internal coordination through clearly assigned roles and permissions.
- Improve customer experience through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce

Salesforce is a cloud-based CRM platform used to manage customer data, automate operations, and streamline services across departments. It offers point-and-click customization as well as developer tools like Apex and Flows for more advanced setups.

Custom Objects

Custom Objects work like database tables and store business-specific data.

Examples:

- **Customer__c** – Stores customer information
- **Product__c** – Contains product details
- **Order__c** – Records customer orders
- **Inventory__c** – Tracks stock levels
- **Campaign__c** – Manages marketing activities

Tabs

Tabs provide easy access to these objects inside the Salesforce interface.

Custom App

A custom app groups related tabs and tools together for a business function—in this case, the HandsMen Threads CRM.

Profiles

Profiles determine what a user can view or edit.

Roles

Roles define the level of data visibility within the organization's hierarchy.

Permission Sets

Additional permissions granted to users without editing their profiles.

Validation Rules

These ensure correct and meaningful data entries.

Examples:

- Email must include '@gmail.com'
- Stock value cannot fall below zero

Email Templates

Pre-formatted email layouts used for notifications like:

- Order Confirmation
- Low Stock Warning
- Loyalty Status Update

Email Alerts

Automated emails triggered by Flows or processes.

Flows

Flows automate business logic without writing code.

Examples:

- Sending confirmation emails when an order is updated
- Notifying managers about low stock
- Updating loyalty status daily

Apex

Apex is Salesforce's programming language used for custom logic.

Examples:

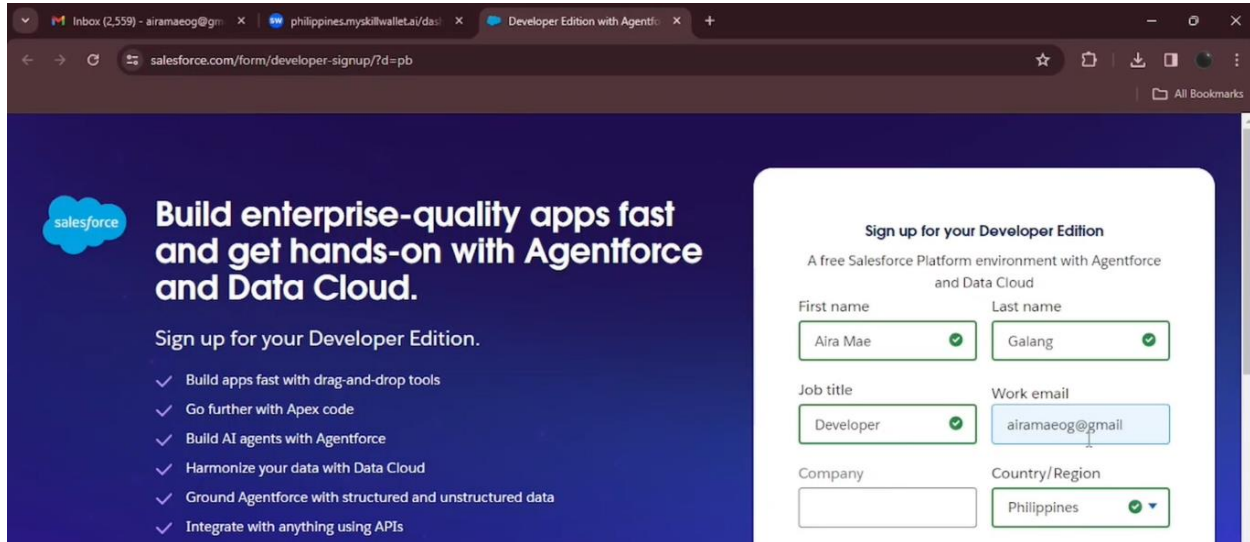
- Auto-calculating order totals
- Deducting stock when items are purchased
- Updating loyalty tiers

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

A Salesforce Developer Org was created using the official signup page.

Basic setup steps included verifying the account, creating a password, and navigating to the Setup page.

A screenshot of a web browser showing the Salesforce Developer Edition signup page. The browser's address bar displays 'salesforce.com/form/developer-signup/?d=pb'. The page has a dark blue header with the Salesforce logo and the text 'Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.' Below this, it says 'Sign up for your Developer Edition.' and lists several benefits: 'Build apps fast with drag-and-drop tools', 'Go further with Apex code', 'Build AI agents with Agentforce', 'Harmonize your data with Data Cloud', 'Ground Agentforce with structured and unstructured data', and 'Integrate with anything using APIs'. On the right side, there is a white form titled 'Sign up for your Developer Edition' with the subtitle 'A free Salesforce Platform environment with Agentforce and Data Cloud'. The form contains several input fields: 'First name' (filled with 'Aira Mae'), 'Last name' (filled with 'Galang'), 'Job title' (filled with 'Developer'), 'Work email' (filled with 'airamaeog@gmail'), 'Company' (empty), and 'Country/Region' (a dropdown menu showing 'Philippines'). Each field has a green checkmark icon indicating it is valid.

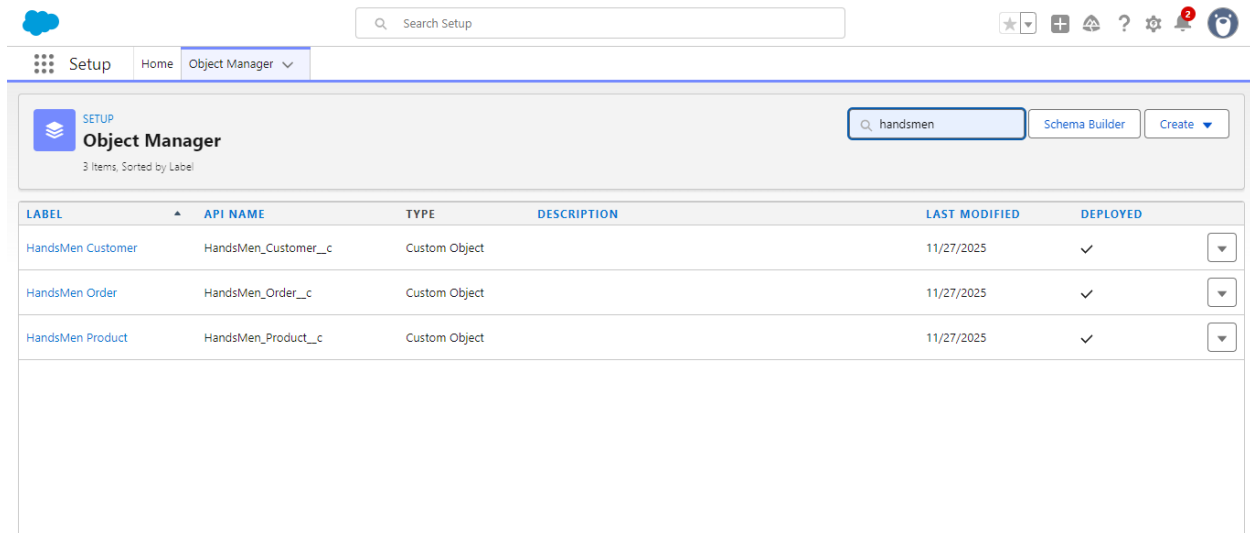
2. Creating Custom Objects

Five custom objects were created to store the most important business data:

- **Customer** – email, phone, and loyalty status
- **Product** – price, SKU, and product details
- **Order** – quantity, total, status
- **Inventory** – available stock and warehouse information
- **Marketing Campaign** – promos and schedules

Steps used:

1. Setup → Object Manager → New Custom Object
2. Assigned labels and API names
3. Enabled search and reporting
4. Created tabs for each object



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Object Manager' header includes a search bar with 'handsmen' and buttons for 'Schema Builder' and 'Create'. The main content area displays a table of custom objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
HandsMen Customer	HandsMen_Customer__c	Custom Object		11/27/2025	✓	▼
HandsMen Order	HandsMen_Order__c	Custom Object		11/27/2025	✓	▼
HandsMen Product	HandsMen_Product__c	Custom Object		11/27/2025	✓	▼

3. Creating the Lightning App

A custom Lightning App named **HandsMen Threads** was built and assigned to the System Administrator profile.

Included tabs:

- Customer
- Order
- Product
- Inventory
- Campaign
- Reports

4. Validation Rules

To improve data accuracy:

- **Order Object:** Total Amount must be greater than 0
Error message: "Please enter a valid amount."
- **Customer Object:** Email must contain @gmail.com
Error message: "Please provide a valid Gmail address."

5. User Roles & Profiles

- A Standard User profile was cloned and customized into **Platform 1 Profile**.
- Three roles were created:
 - Sales Manager

- Inventory Manager
- Marketing Team

These roles define what data each user can access.

6. User Creation

Users were added with their respective roles:

- **Niklaus Mikaelson** – Sales Team
- **Kol Mikaelson** – Inventory Team
- **Daniel Mikaelson** – Marketing Team

This ensures proper separation of responsibilities and data access.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Users' selected. The main content area is titled 'SETUP Users'. It features a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Three users are highlighted with yellow boxes:

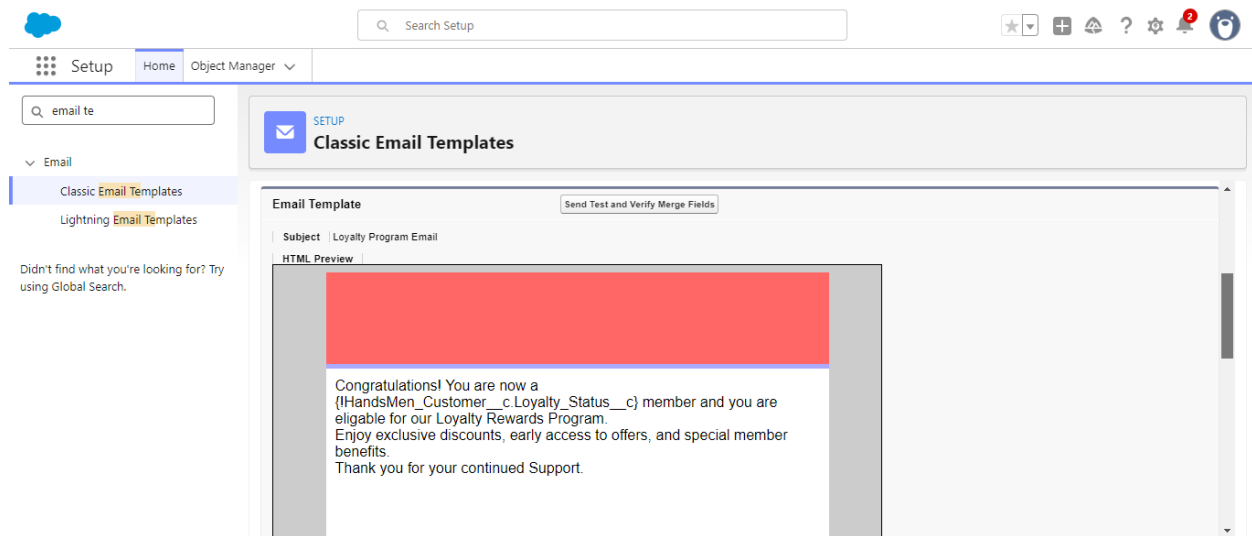
Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d9i0000fta7luaf.nvnkrxhvy2n@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC_QroFarm	QEPIC	epic_172eaf63c2c@qrofarm.salesforce.com		✓	System Administrator
Edit	Gaiano_Aira Mae	air	airamaeg178@agentforce.com		✓	System Administrator
Edit	Mikaelson, Daniel	dmika	airamaeg678@gmail.com	Marketing	✓	Platform 1
Edit	Mikaelson, Kol	kmika	airamaeg456@gmail.com	Inventory	✓	Platform 1
Edit	Mikaelson, Niklaus	nmika	airamaeg123@gmail.com	Sales	✓	Platform 1
Edit	User_Integration	inteo	integration@00d9i0000fta7luaf.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@00d9i0000fta7luaf.com		✓	Analytics Cloud Security User

7. Email Template & Alerts

Three email templates were created:

1. **Order Confirmation**
2. **Low Stock Alert**
3. **Loyalty Status Update**

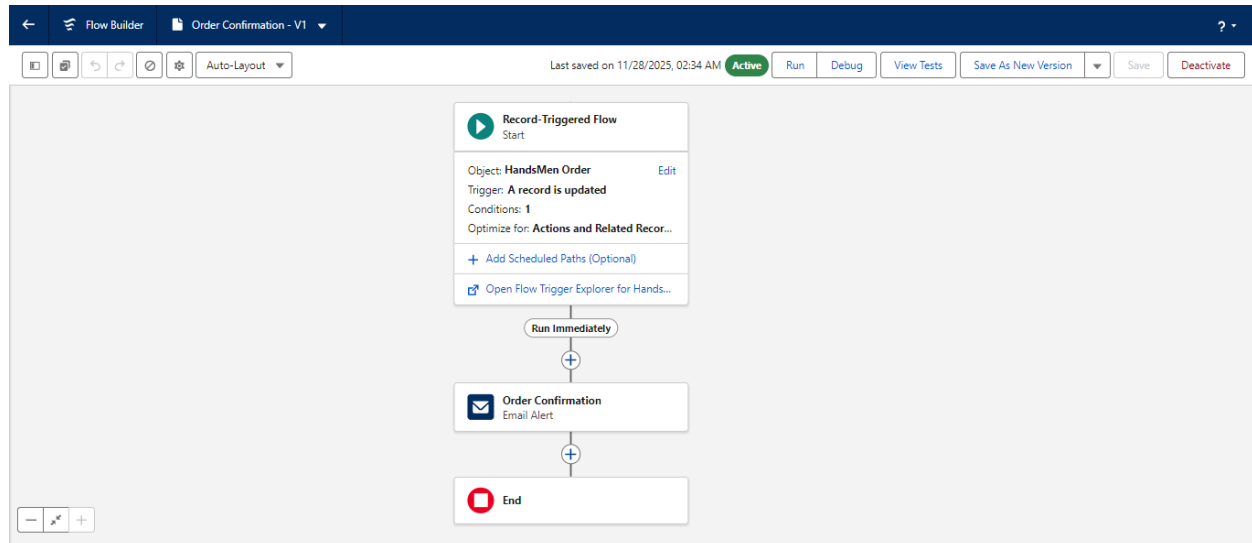
Email Alerts were then set up and connected to Flows to send notifications automatically.



8. Flow Implementations

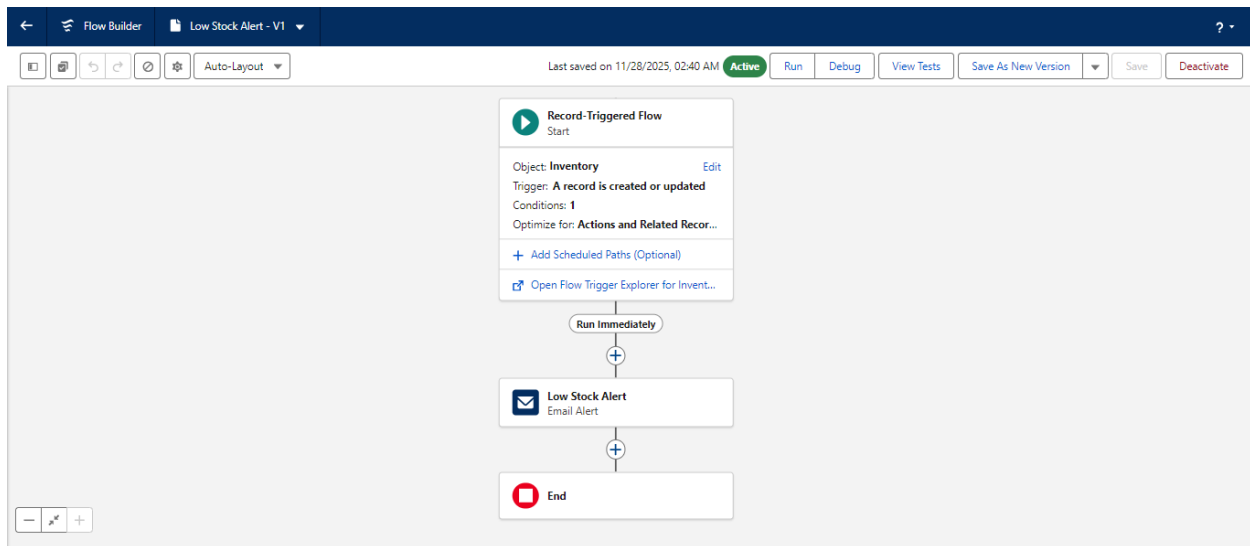
a. Order Confirmation Flow

Triggered when an order's status becomes "Confirmed."
Automatically emails the customer.



b. Stock Alert Flow

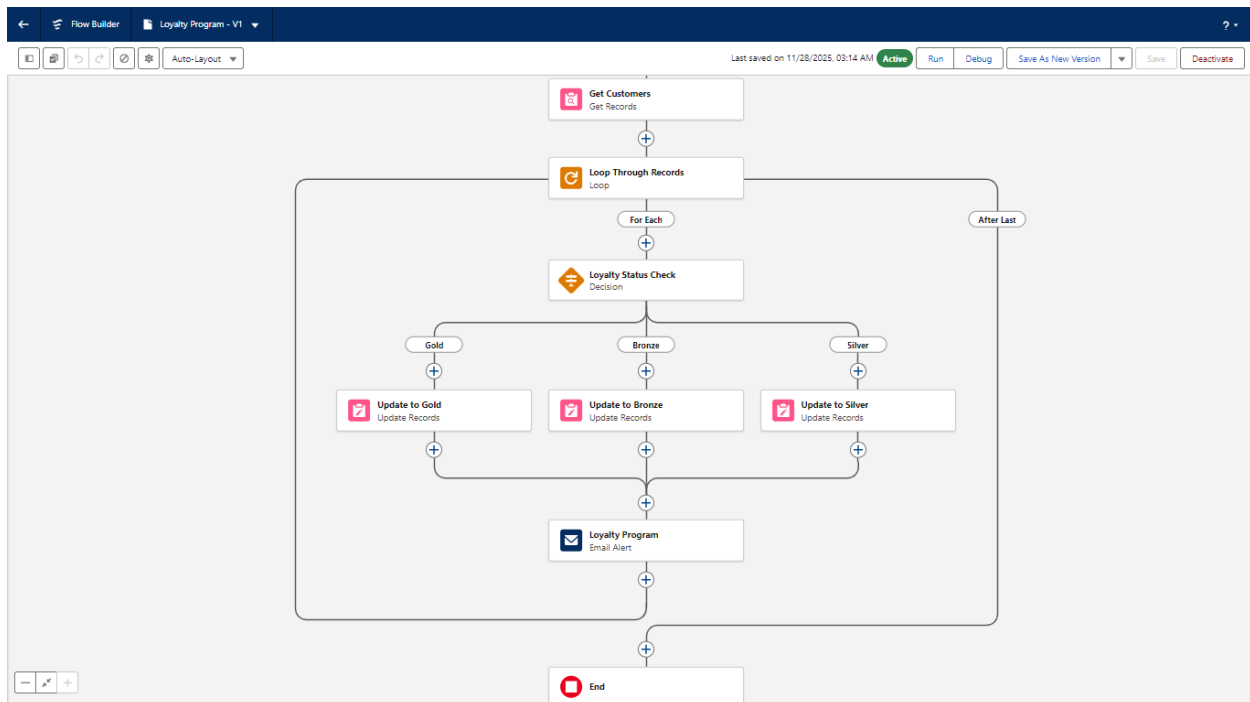
Monitors inventory levels.
Sends an alert to the Inventory Manager if stock < 5.



c. Scheduled Loyalty Update Flow

Runs every night at 12 AM.

Reviews customer purchases and updates their loyalty level.



9. Apex Triggers

Custom automation using Apex:

- **Order Total Trigger**
Automatically multiplies quantity by price.
- **Inventory Trigger**
Deducts stock when an order is placed.
- **Loyalty Status Trigger**
Updates membership level based on lifetime purchases.

REAL-WORLD PROJECT WALKTHROUGH

1. Customer Registration

Elijah Mikaelson signs up or purchases in-store.
A Customer record is created.
Validation makes sure the email format is correct.

2. Product Setup

Admin adds clothing items like shirts, suits, etc.
Inventory is updated accordingly.

3. Order Placement

Elijah buys 2 shirts priced at ₱2500 each.
Salesforce creates an Order record.
Apex calculates the total automatically.

4. Inventory Update

Stock is reduced by 2 units.
Validation rules prevent negative stock.

5. Loyalty Program

Elijah's total purchase amount is checked.
His membership level is adjusted (e.g., Bronze, Silver, Gold).

6. Email Notifications

He receives emails confirming:

- His order
- His loyalty upgrade

7. User Roles

Salesforce users like Niklaus and Kol handle Sales and Inventory.

SCREENSHOTS

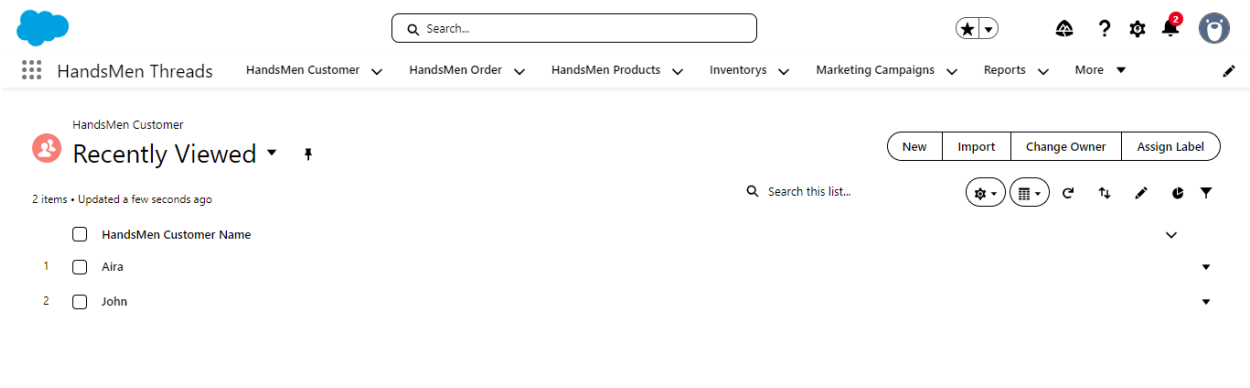


Figure 1: Custom Application HandsMen Threads

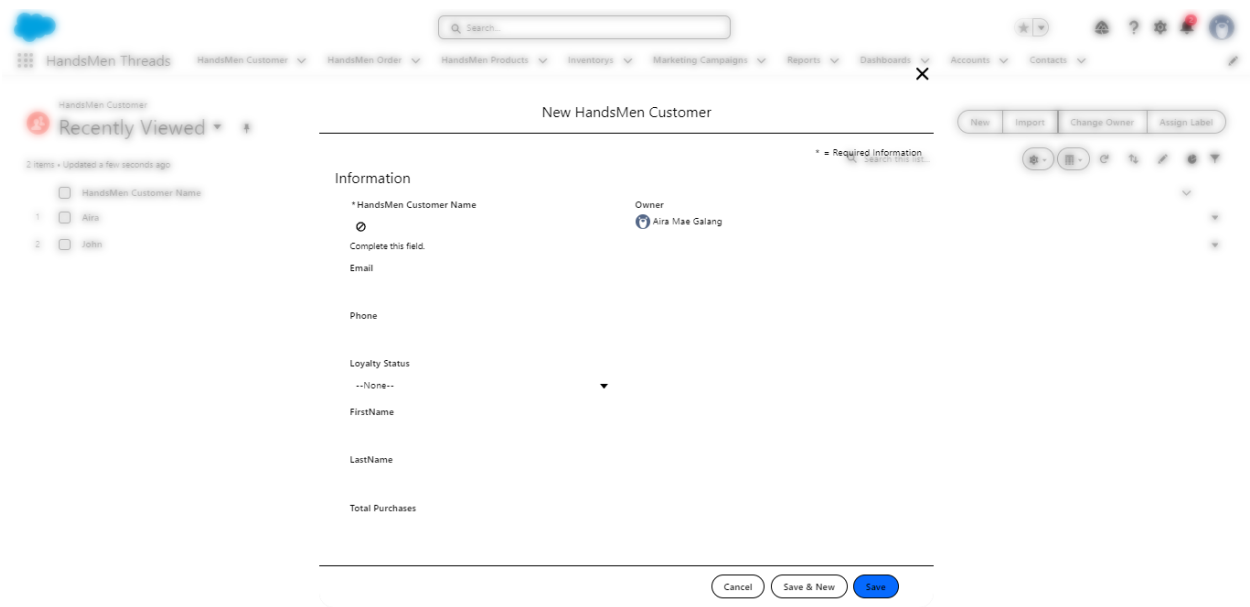


Figure 2: Customer Creation in HandsMen Threads

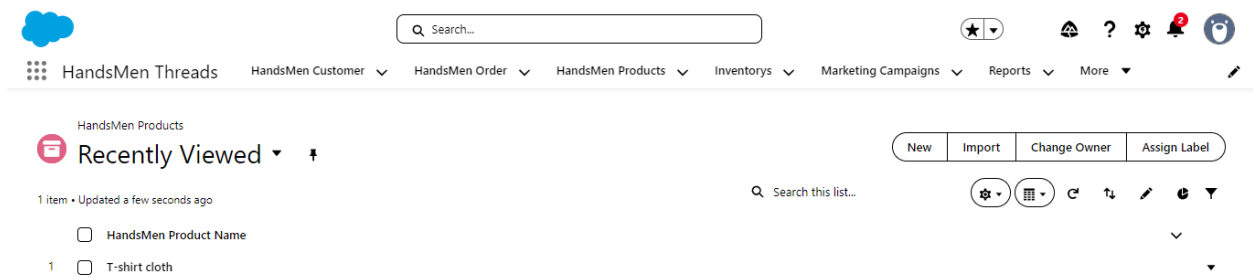


Figure 3: Products in HandsMen Threads

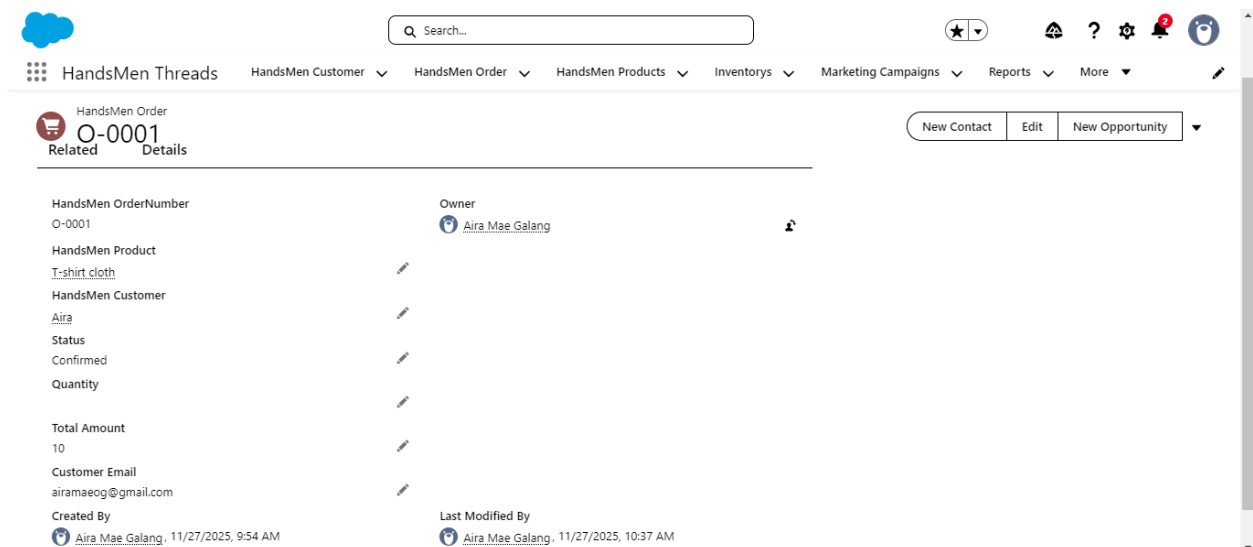


Figure 4: Order Confirmation in HandsMen Threads

Dear Aira,


Your order #O-0001 has been confirmed!

Thank you for shopping with us.


Best Regards,


Sales Team


Figure 5: Confirmation Email





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HandsMen Threads

HandsMen Customer

HandsMen Order

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Inventory

I -0001

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I -0001

HandsMen Product

T-shirt cloth

Stock Quantity

600

Stock Status

Available

Warehouse

Created By

Aira Mae Galang

11/27/2025, 9:52 AM

Last Modified By

Aira Mae Galang

11/27/2025, 11:47 AM

Figure 6: Inventory Creation

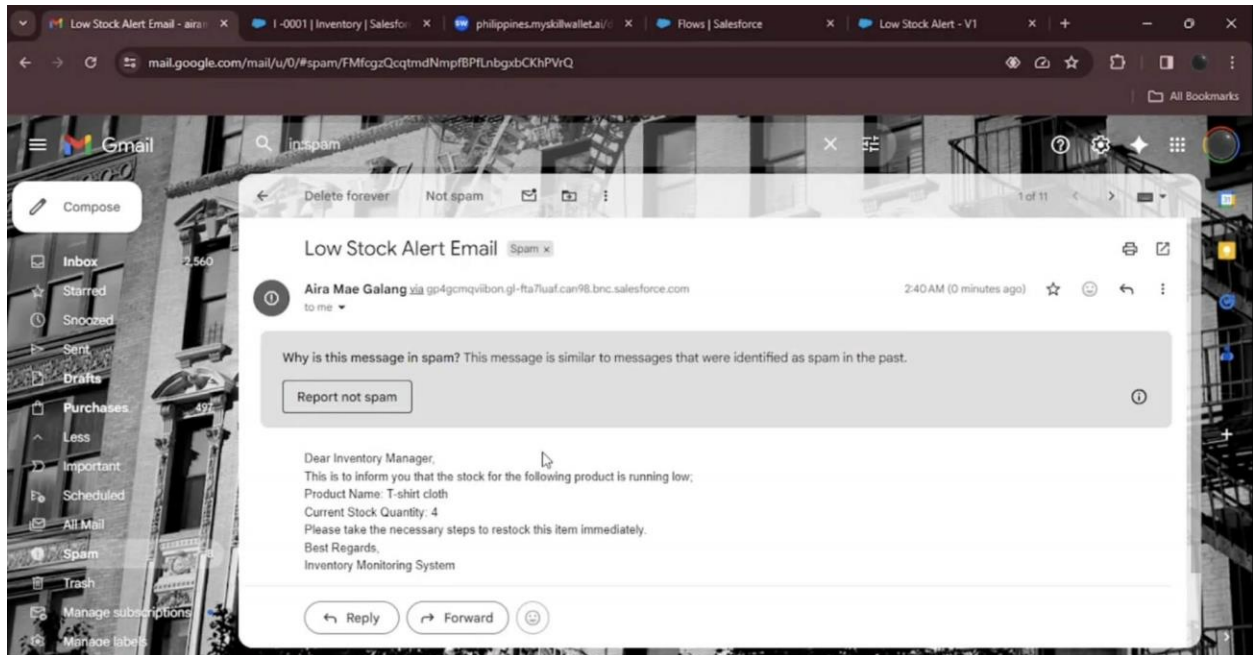


Figure 7: Low Stock Alert Email

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.

Figure 8: Loyalty Program Email

CONCLUSION

The customized Salesforce CRM for HandsMen Threads successfully automates and simplifies the company's daily operations, from customer management to order processing and inventory control. With the use of Flows, Apex, Validation Rules, and custom objects, the system reduces manual work, prevents data inconsistencies, and allows the business to deliver more personalized service.

The project not only enhances operational efficiency but also prepares the company for future expansion due to the scalable nature of the Salesforce Platform.

FUTURE SCOPE

1. **Customer Portal**

A self-service portal where customers can track orders and view loyalty points.

2. **Mobile App (Salesforce Mobile SDK)**

Staff can update orders and inventory while on the go.

3. **Reports & Dashboards**

Visual insights for monitoring sales trends, inventory movement, and customer engagement.

4. **AI-Powered Recommendations (Einstein)**

Personalized product suggestions based on buyer behavior.

5. **WhatsApp/SMS Integration**

Automatic notifications for orders, promos, and loyalty updates.