

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

PROJECT OVERVIEW

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

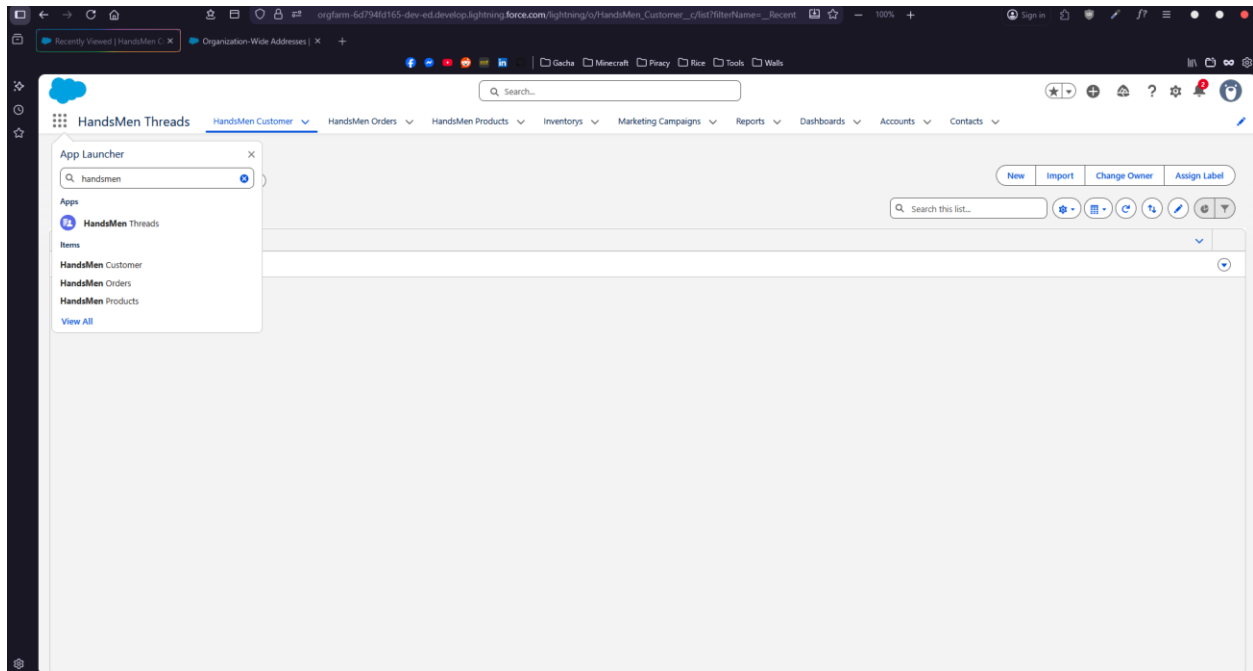
Description: HandsMen Threads is implementing a customized Salesforce CRM to modernize its business operations, streamline data management and grow customer engagement. The CRM will centralize the key business information including customers, products, orders and inventory into a unified and reliable system.

OBJECTIVES

- Ensure high data integrity by implementing UI-level validation rules and structured data entry processes.
- Centralize all customer, order, product, and inventory information into a unified Salesforce CRM.
- Automate key business processes to reduce manual workload, including order confirmations, loyalty updates, and stock alerts.
- Provide real-time visibility into customer activity, inventory levels, and financial updates for informed decision-making.
- Improve customer engagement through timely communications and personalized loyalty program adjustments.

APPLICATION ARCHITECHTURE

Custom Application Name: HandsMen Threads



Custom Objects:

- **HandsMen Customer:** Used to create new customer with fields like name, email, phone, loyalty status and total purchases.
- **HandsMen Product:** Used to create new product with fields like SKU, price and stock quantity.
- **HandsMen Order:** Used to make an order for customers with fields like status (e.g. Pending, Confirmed), quantity, total amount and product.
- **Inventory:** Used to manage the stock of a product.
- **Marketing Campaign:** Used to make a marketing campaign for advertisements and promotions.

HandsMen Threads Application Structure

Object Name	Type	Description	Key Fields
HandsMen Customer__c	Custom Object	Stores customer details	Name (Record Name), Email (Email), Phone (Phone), Loyalty_Status__c (Picklist: Bronze, Gold, Silver)
HandsMen Product__c	Custom Object	Stores product catalog	Name (Record Name), SKU (Text), Price (Currency), Stock_Quantity__c (Number)
HandsMen Order__c	Custom Object	Stores customer orders	Order_Number (Record Name), Status (Picklist: Pending, Confirmed, Rejection), Quantity__c (Number), Total_Amount__c(Number)
Inventory__c	Custom Object	Tracks inventory levels	Auto Number (Record Name), Warehouse (Text), Stock_Quantity__c (Number)
Marketing_Campaign__c	Custom Object	Manages promotions & campaigns	Campaign_Name (Record Name), Start_Date (Date), End_Date (Date)

Standard Objects:

- *Reports*
- *Dashboards*
- *Accounts*
- *Contacts*

APPLICATION FLOWS

1. Create a HandsMen Customer

- Necessary Fields: **HandsMen Customer Name, Email, FirstName and LastName.**

HandsMen Orders ▾ HandsMen Products ▾ Inventories ▾ Marketing Campaigns ▾ Reports ▾ Dashboards ▾ Account ▾

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name Owner
 Angelo Miko Botabara
Complete this field.

Email

Phone

Loyalty Status

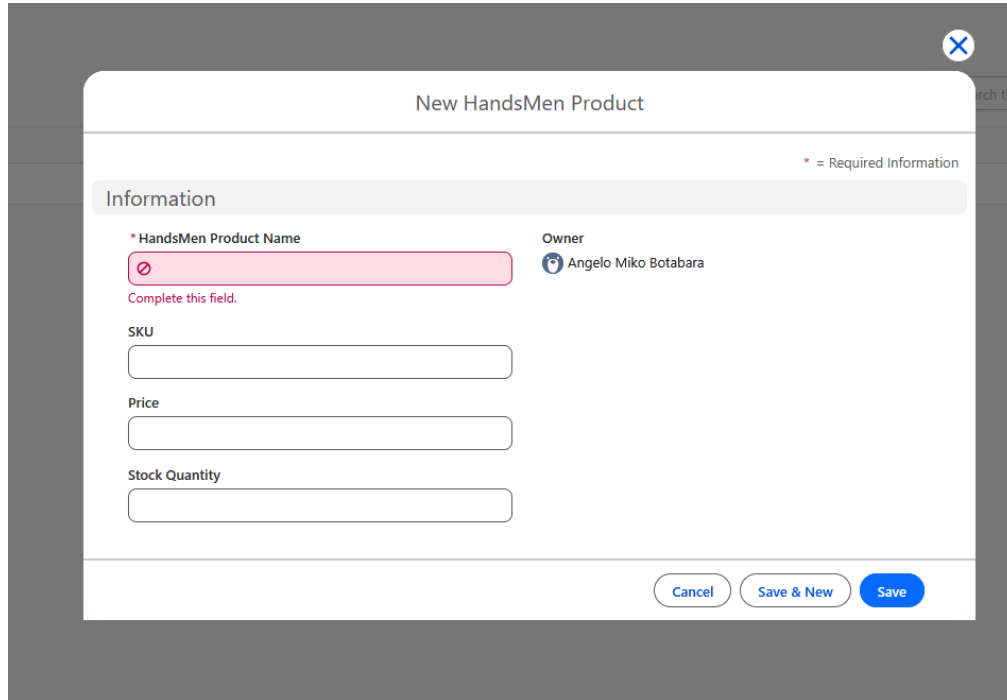
FirstName

LastName

Total Purchases

2. Create a HandsMen Products

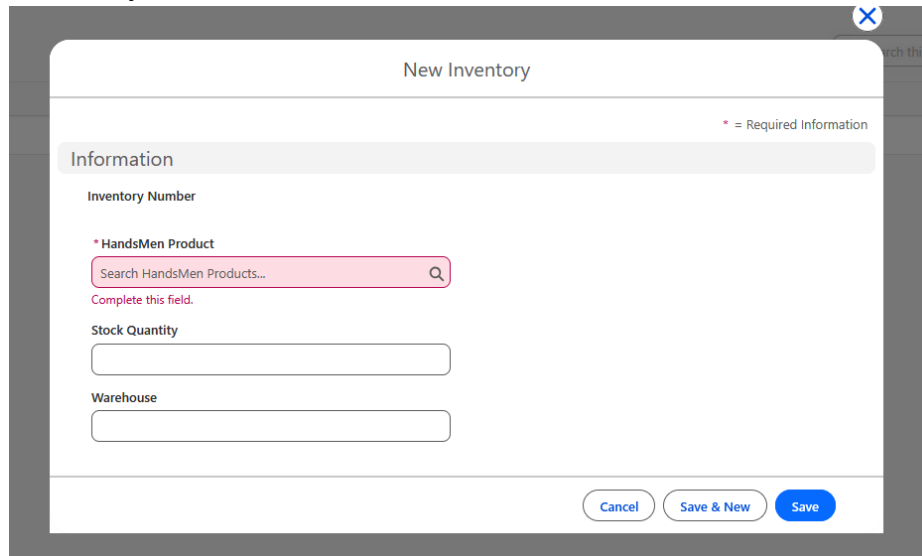
- Necessary Fields: **All**



The screenshot shows a modal window titled "New HandsMen Product". At the top right is a close button (X). Below the title bar, on the right, is a legend: "* = Required Information". The form is divided into an "Information" section. It contains the following fields: "HandsMen Product Name" (marked with an asterisk, highlighted in pink with a red 'X' icon, and has the text "Complete this field." below it), "SKU", "Price", and "Stock Quantity". To the right of these fields is the "Owner" section, which shows a user icon and the name "Angelo Miko Botabara". At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

3. Create Inventory records

- Necessary Fields: **All**



The screenshot shows a modal window titled "New Inventory". At the top right is a close button (X). Below the title bar, on the right, is a legend: "* = Required Information". The form is divided into an "Information" section. It contains the following fields: "Inventory Number", "HandsMen Product" (marked with an asterisk, highlighted in pink with a red 'X' icon, and has the text "Complete this field." below it; the input is a search bar with the placeholder "Search HandsMen Products..." and a magnifying glass icon), "Stock Quantity", and "Warehouse". At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

4. Create an Order

- Necessary Fields: **All**

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner
Angelo Miko Botabara

Customer
Search HandsMen Customer... Q

Status
--None-- ▼

Quantity
[]

Total Amount
[]

* Customer Email
[]

HandsMen Product
Search HandsMen Products... Q

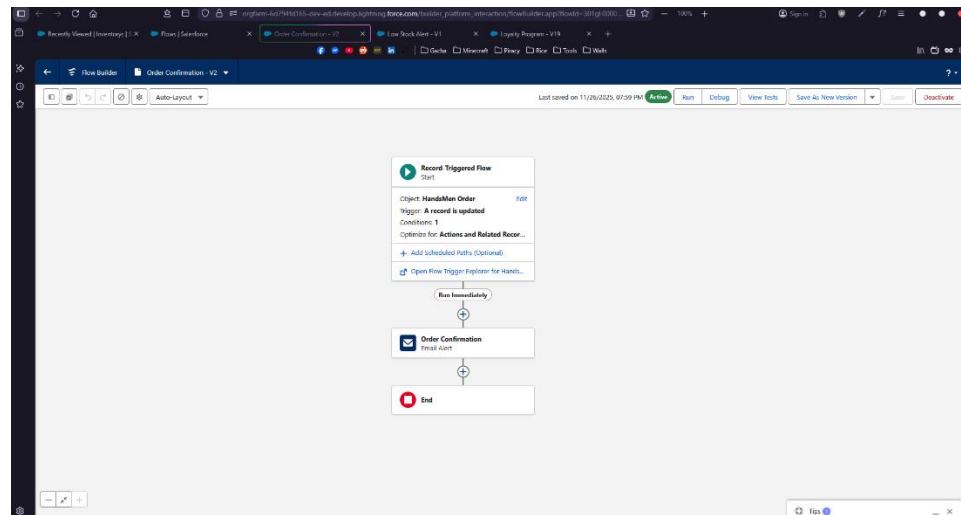
Cancel Save & New Save

BUSINESS AUTOMATIONS FLOWS AND SCHEDULED PROCESSES

A. Flows

1. Order Confirmation Flow

- **Purpose:** If **status** field is confirmed then send the order confirmation email alert.

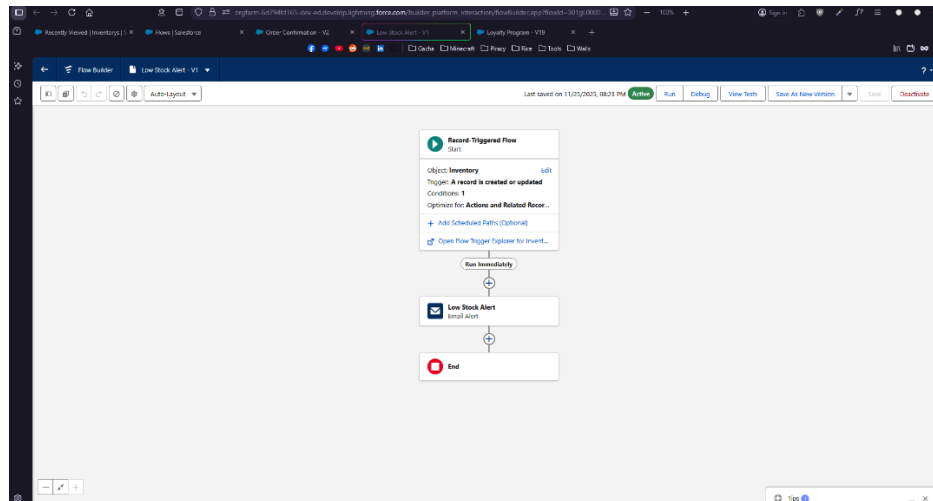


Order Confirmation Email Template

Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order #{!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

2. Low Stock Alert Flow

- **Purpose:** If stock quantity field is less than 5 then **send the low stock email alert.**

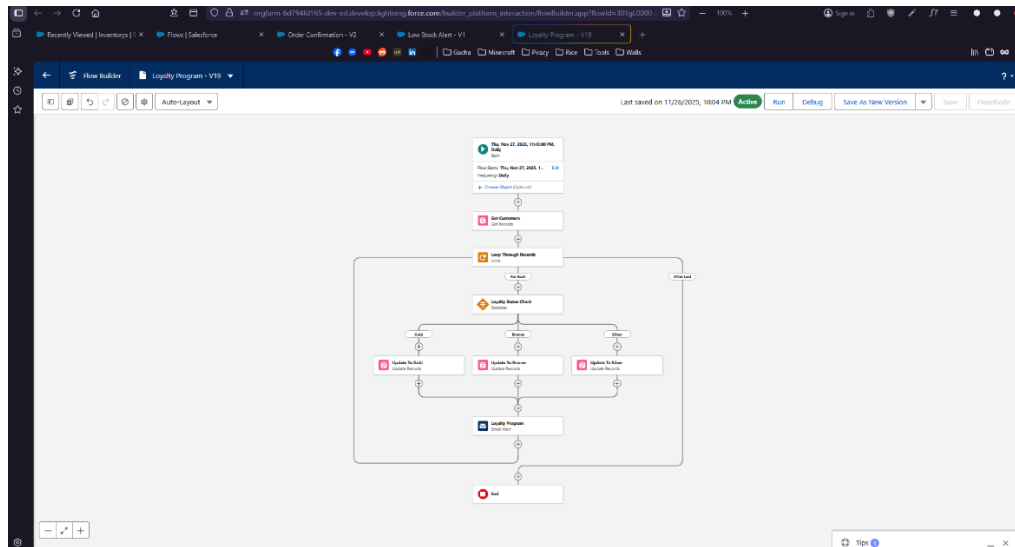


Low Stock Alert Email Template

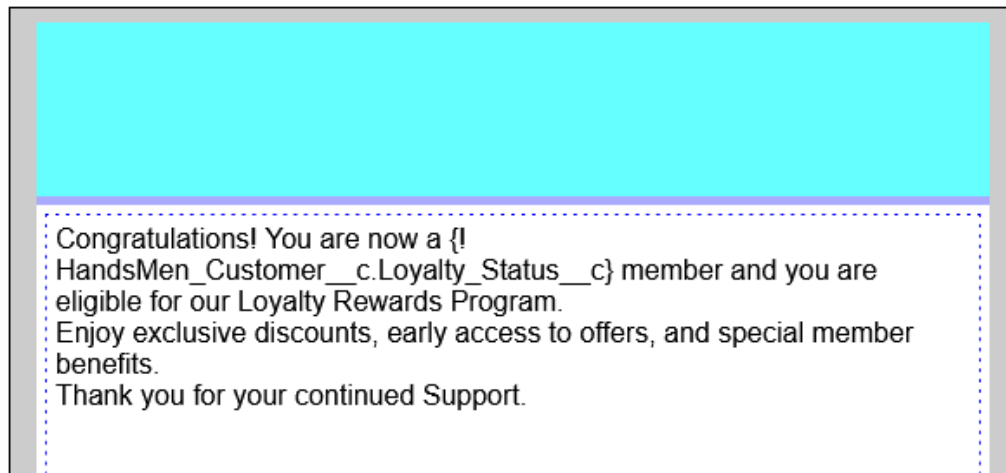
Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: {!Inventory__c.HandsMen_Product__c}
Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory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

3. Loyalty Program Flow

- **Purpose:** It runs on specified date and get all the handsmen customer, loop through its records and check the loyalty status based on total purchases. It then updates the loyalty status to either Bronze, Silver or Gold and send a loyalty program email alert.



Loyalty Program Email Template



B. Triggers

1. Order Total Trigger

- **Purpose: OrderTotalTrigger**, automatically calculates the total amount (**Total_Amount__c**) for orders (**HandsMen_Order__c**) before they are inserted or updated. It retrieves the price (**Price__c**) of the associated product (**HandsMen_Product__c**) and multiplies it by the order's quantity (**Quantity__c**) to compute the total.

```
1  trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2      Set<Id> productIds = new Set<Id>();
3
4      for (HandsMen_Order__c order : Trigger.new) {
5          if (order.HandsMen_Product__c != null) {
6              productIds.add(order.HandsMen_Product__c);
7          }
8      }
9
10     Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11         [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12     );
13
14     for (HandsMen_Order__c order : Trigger.new) {
15         if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product
16             HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17         if (order.Quantity__c != null) {
18             order.Total_Amount__c = order.Quantity__c * product.Price__c;
19         }
20     }
21 }
```

2. Stock Deduction Trigger

- Purpose: This Salesforce Apex Trigger updates inventory levels (**Inventory__c**) when an order (**HandsMen_Order__c**) is confirmed. It first retrieves inventory records associated with the products in the orders. For each confirmed order (**Status__c == 'Confirmed'**), it reduces the stock quantity (**Stock_Quantity__c**) of the corresponding inventory by the order's quantity (**Quantity__c**).

```
Code Coverage: None | API Version: 65 | Go To
16      WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22      if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23        for (Inventory__c inv : inventoryMap.values()) {
24          if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25            inv.Stock_Quantity__c -= order.Quantity__c;
26            inventoriesToUpdate.add(inv);
27            break;
28          }
29        }
30      }
31    }
32
33    if (!inventoriesToUpdate.isEmpty()) {
34      update inventoriesToUpdate;
35    }
36  }
```

Conclusions

The HandsMen Threads successfully integrates the necessary objectives like high data integrity due to strong validation rules, centralized all information in one CRM application, automate key processes to reduce workload and most of all provide real-time visibility to customer.

The project actually shows how Salesforce CRM help business grow, improving their customer experience with various tools and customization.