

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

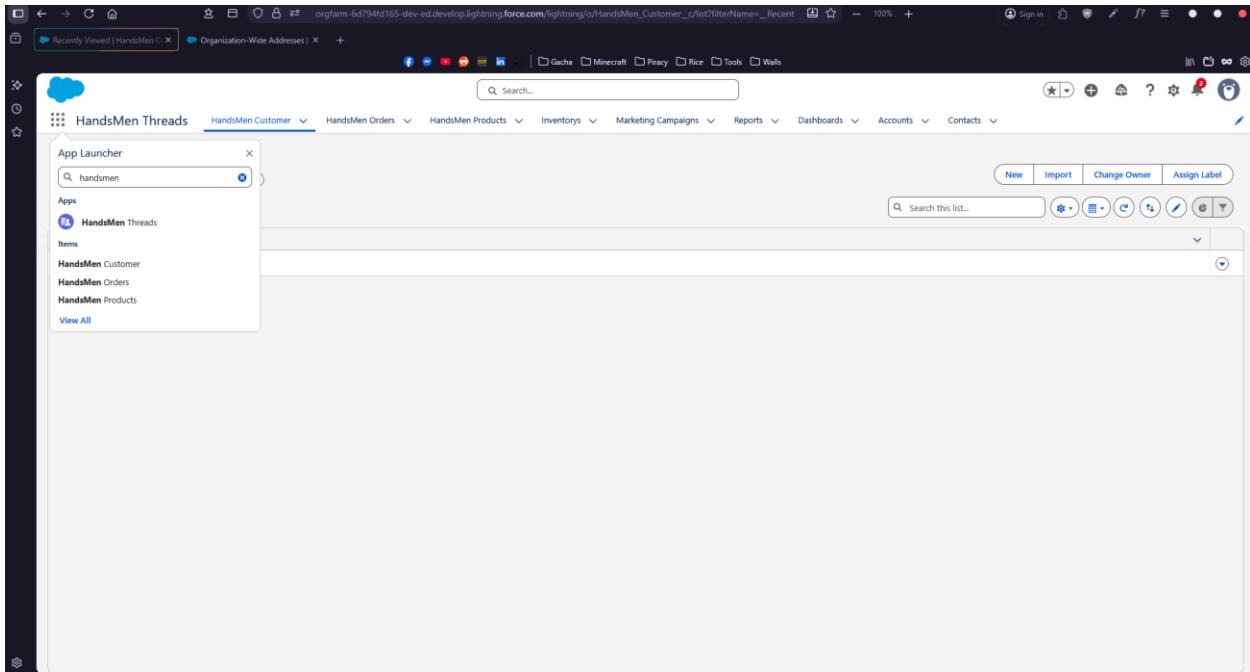
Description: HandsMen Threads is implementing a customized Salesforce CRM to modernize its business operations, streamline data management and grow customer engagement. The CRM will centralize the key business information including customers, products, orders and inventory into a unified and reliable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

The screenshot shows a modal window titled "New HandsMen Customer". At the top right, there is a small "X" icon. Below the title, a note says "* = Required Information". The main section is labeled "Information". It contains the following fields:

- * HandsMen Customer Name: A red-highlighted input field with a placeholder icon (a person with a question mark) and the error message "Complete this field."
- Owner: Shows a profile picture of Angelo Miko Botabara.
- Email: An empty input field.
- Phone: An empty input field.
- Loyalty Status: A dropdown menu showing "--None--".
- FirstName: An empty input field.
- LastName: An empty input field.
- Total Purchases: An empty input field.

At the bottom of the form are three buttons: "Cancel", "Save & New" (highlighted in blue), and "Save".

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, a note says "* = Required information". The main area is labeled "Information". It contains fields for "HandsMen Product Name" (which is required and currently empty, highlighted with a pink border), "SKU", "Price", and "Stock Quantity". To the right of the product name field is an "Owner" section showing a profile picture of Angelo Miko Botabara. At the bottom are three buttons: "Cancel", "Save & New" (highlighted with a pink border), 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, a note says "* = Required Information". The main area is labeled "Information". It contains fields for "Inventory Number", "HandsMen Product" (which is required and currently empty, highlighted with a pink border), "Stock Quantity", and "Warehouse". To the right of the product field is a search bar with placeholder text "Search HandsMen Products..." and a magnifying glass icon. At the bottom are three buttons: "Cancel", "Save & New" (highlighted with a pink border), and "Save".

4. Create an Order

- Necessary Fields: All

New HandsMen Order

* = Required Information

Information

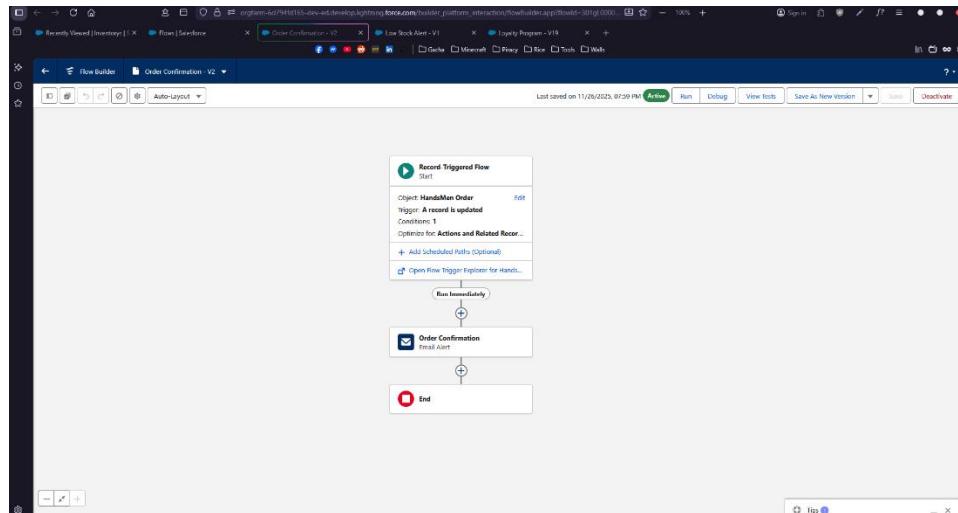
HandsMen OrderNumber	Owner
Customer	
Search HandsMen Customer...	Angelo Miko Botabara
Status	--None--
Quantity	
Total Amount	
* Customer Email	
HandsMen Product	Search HandsMen Products...
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

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.

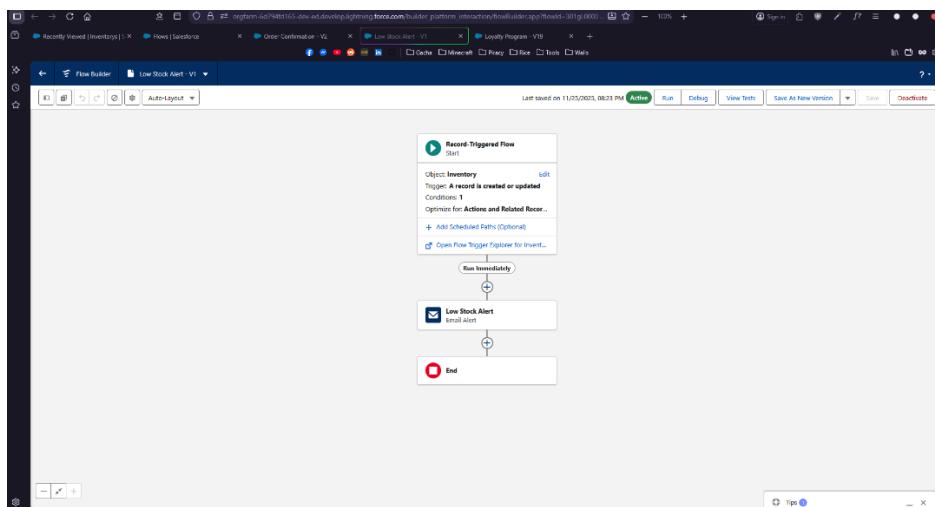


Order Confirmation Email Template



2. Low Stock Alert Flow

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

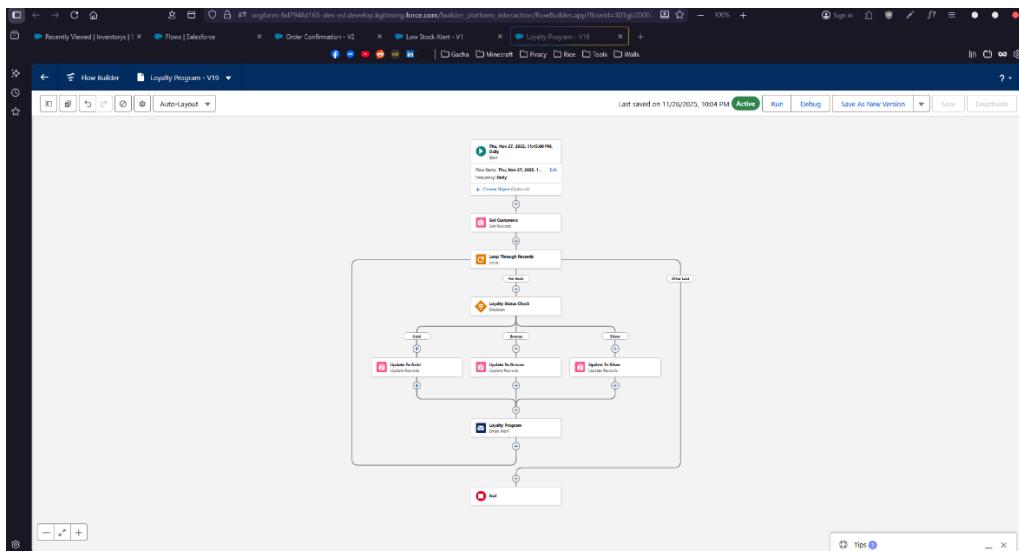


Low Stock Alert Email Template

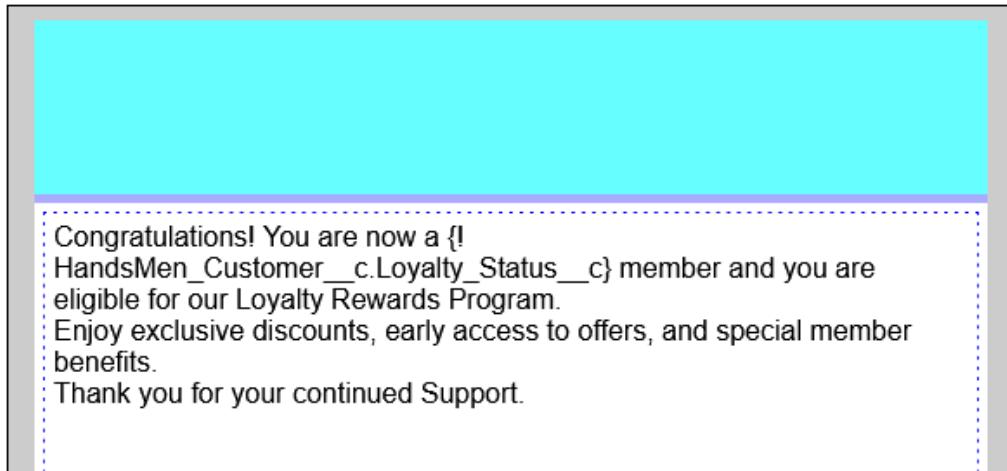
Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: {!Inventory__c.HandsMen_Product__c}
Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory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

3. Loyalty Program Flow

- Purpose: It runs on specified date and get all the handmen 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__c)) {
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.