FREMISTA, LARA DANIELLE V.

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

Project Overview

A Salesforce Customer Relationship Management (CRM) system called HandsMen Threads is designed to manage product inventory, handle marketing campaigns, track orders, and organize customer records in one location. It facilitates more effective teamwork and communication between several departments, including marketing, and sales. Overall, this CRM increases the company's productivity while giving customers a more seamless and customized experience.

Objectives

The main goal of developing the HandsMen Threads CRM system is to make customer management, sales tracking, and marketing activities easier and more efficient. The system is designed to improve data accuracy, and strengthen customer engagement through automation. Using Salesforce tools like workflows, flows, and reports, the CRM allows users to manage customer information, monitor orders, and track loyalty programs. It also supports personalized communication and automatic updates such as order confirmations and stock alerts.

Requirement Analysis & Planning

Understanding Business Requirements

The business required a CRM that could effectively manage customer data, track product inventory, monitor orders, and support marketing campaigns. The existing manual processes were time-consuming and prone to errors, prompting the need for a digital system that ensures data accuracy and efficiency.

Defining Project Scope and Objectives

The project scope included creating custom Salesforce objects for products, customers, and marketing campaigns; setting up automation for emails and stock alerts; and establishing a secure environment through proper profiles, roles, and permission sets.

Design Data Model and Security Model

A structured data model was created linking customers, orders, and campaigns to ensure data integrity. The security model defined user access levels to protect sensitive data, ensuring admins, marketing teams, and sales agents had role-based access.

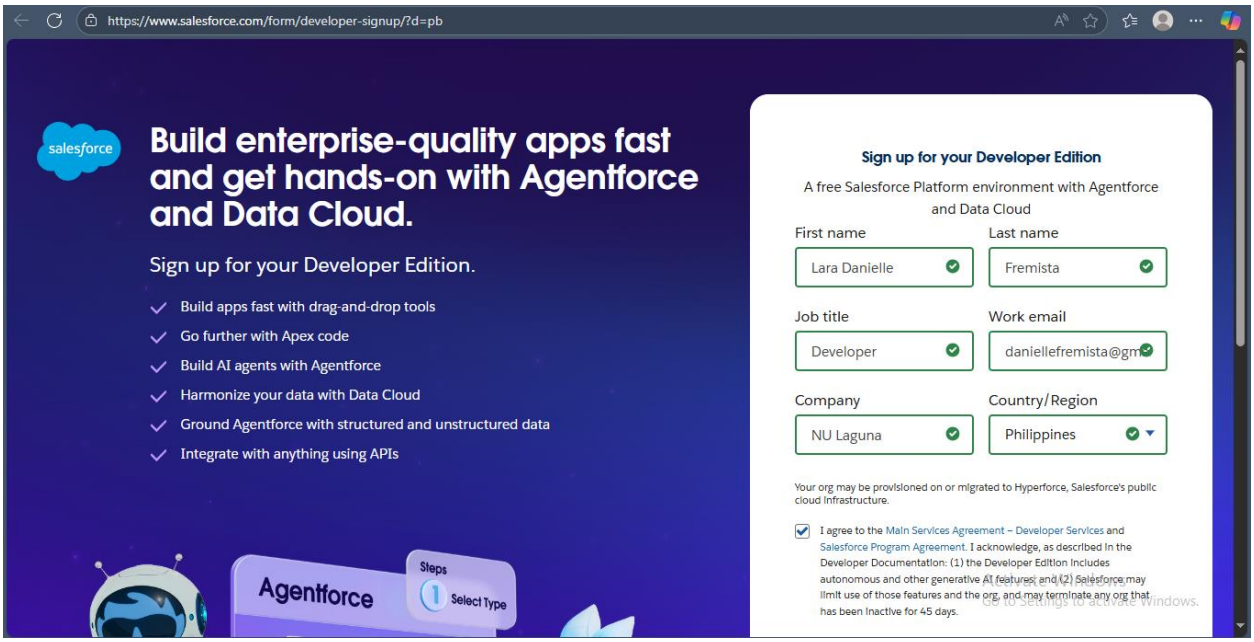
Stakeholders Mapping

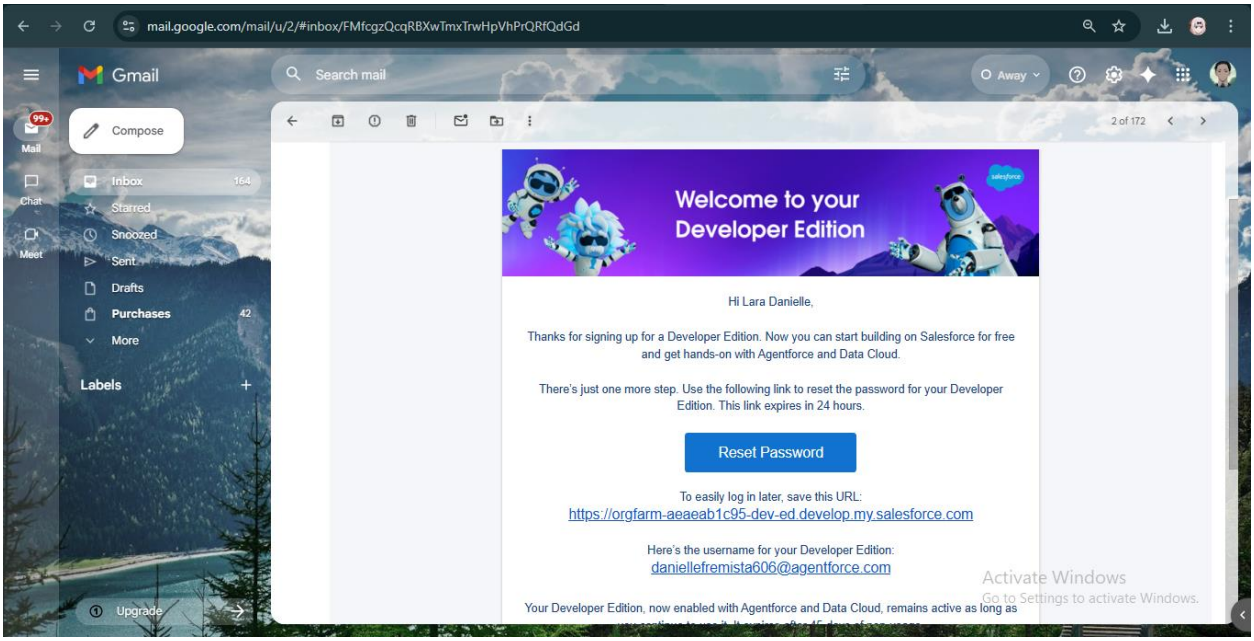
Key stakeholders include the sales, inventory, and marketing roles. Each stakeholder's needs were mapped to specific CRM features and permissions.

Execution RoadMap

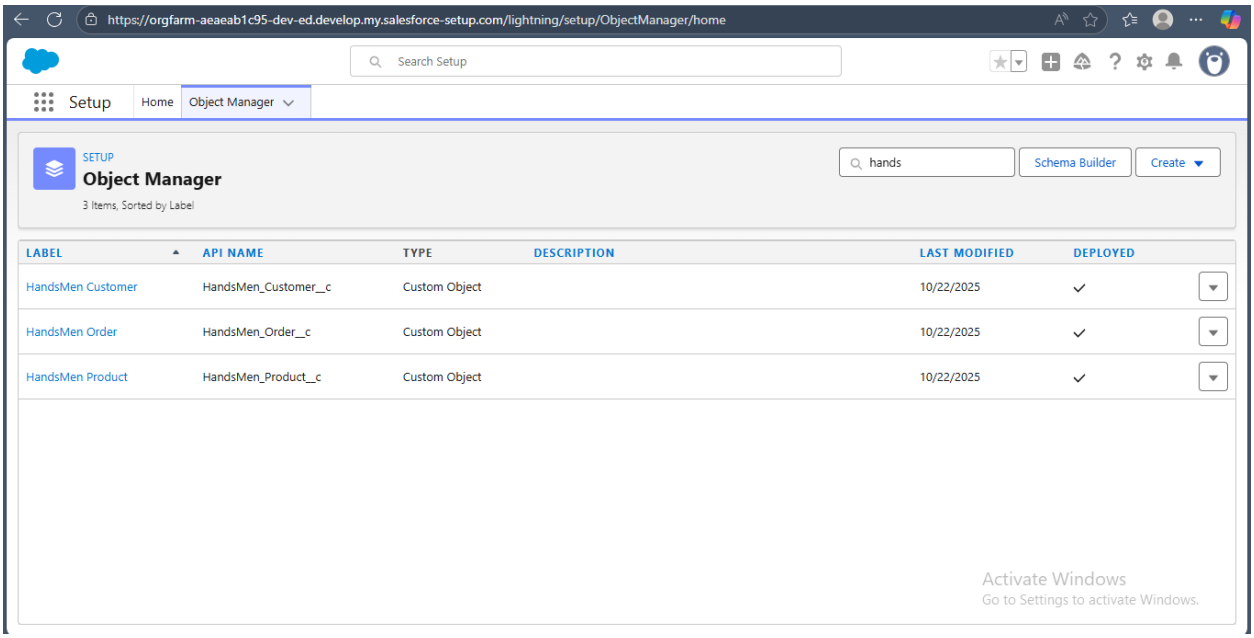
Salesforce development was divided into phases: setting up of objects and fields, configuration of security models, creation of automation (flows, email alerts, apex triggers), and testing.

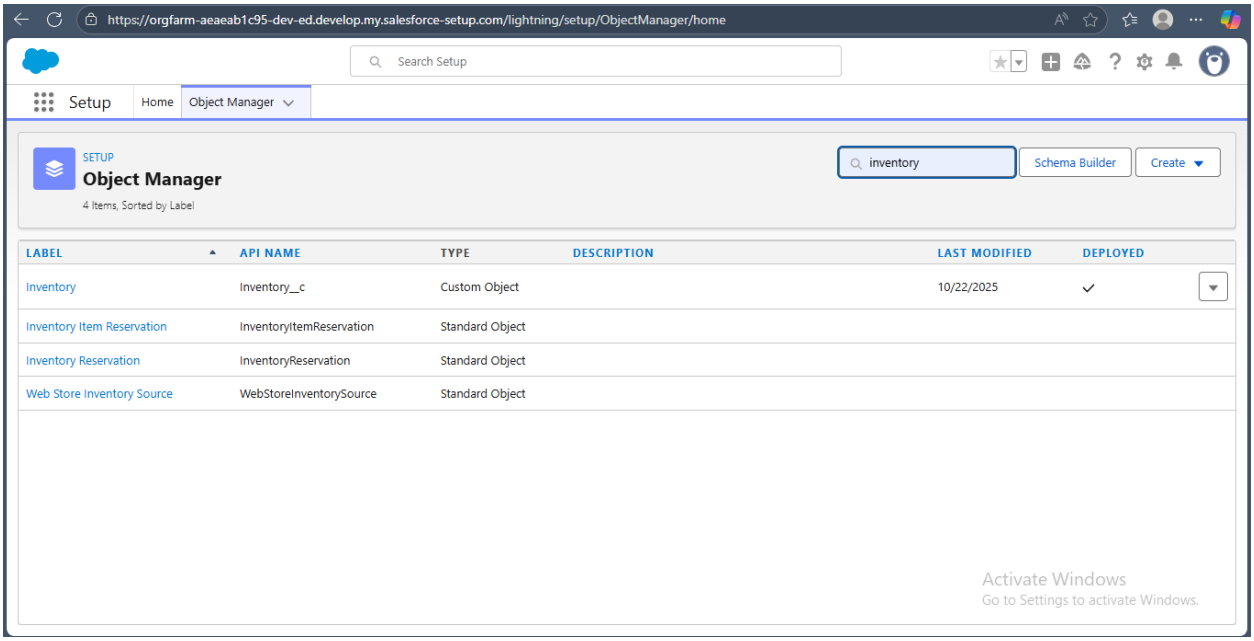
Salesforce Development - Backend & Configurations

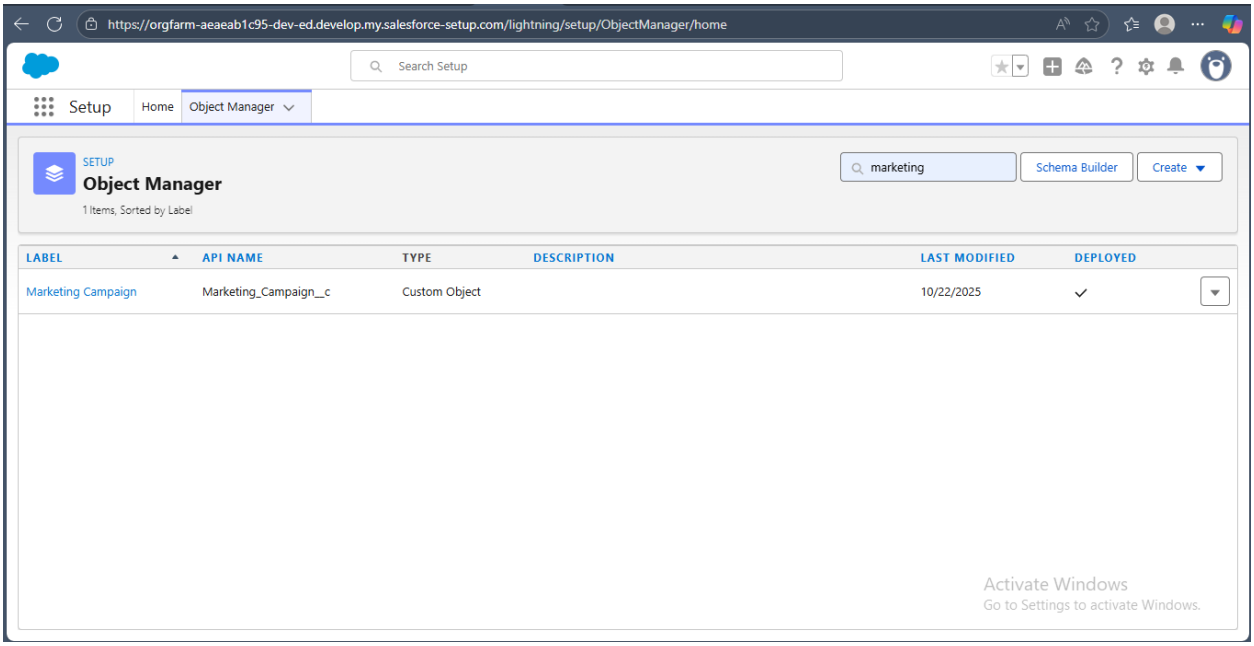




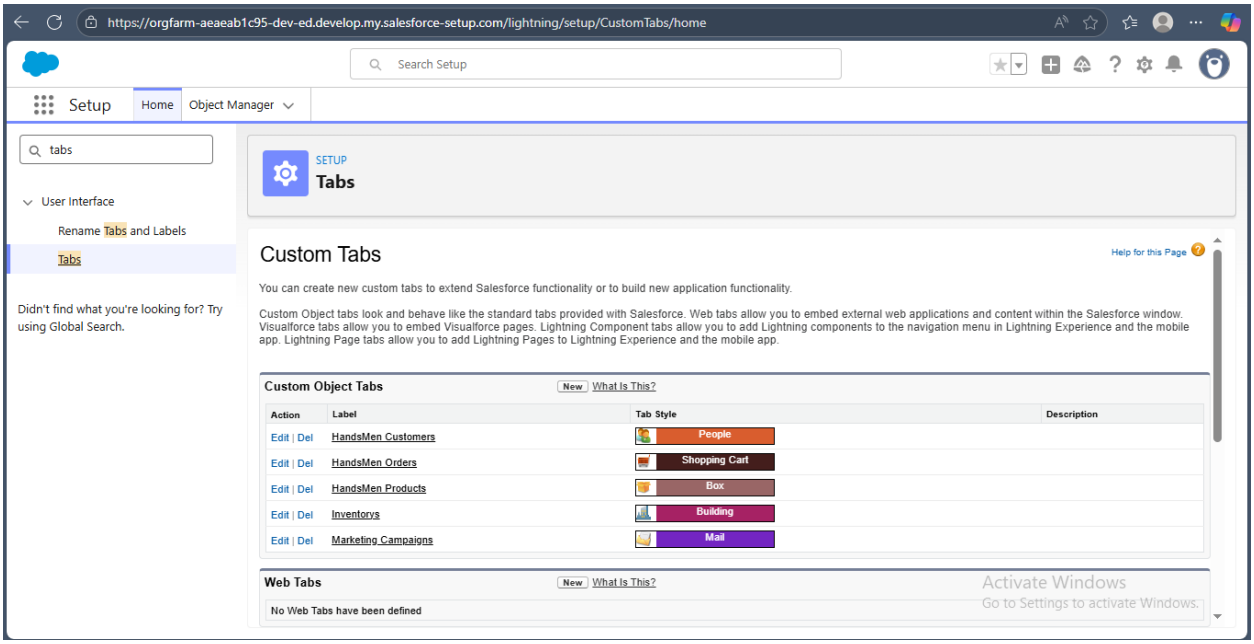
Data Management – Objects



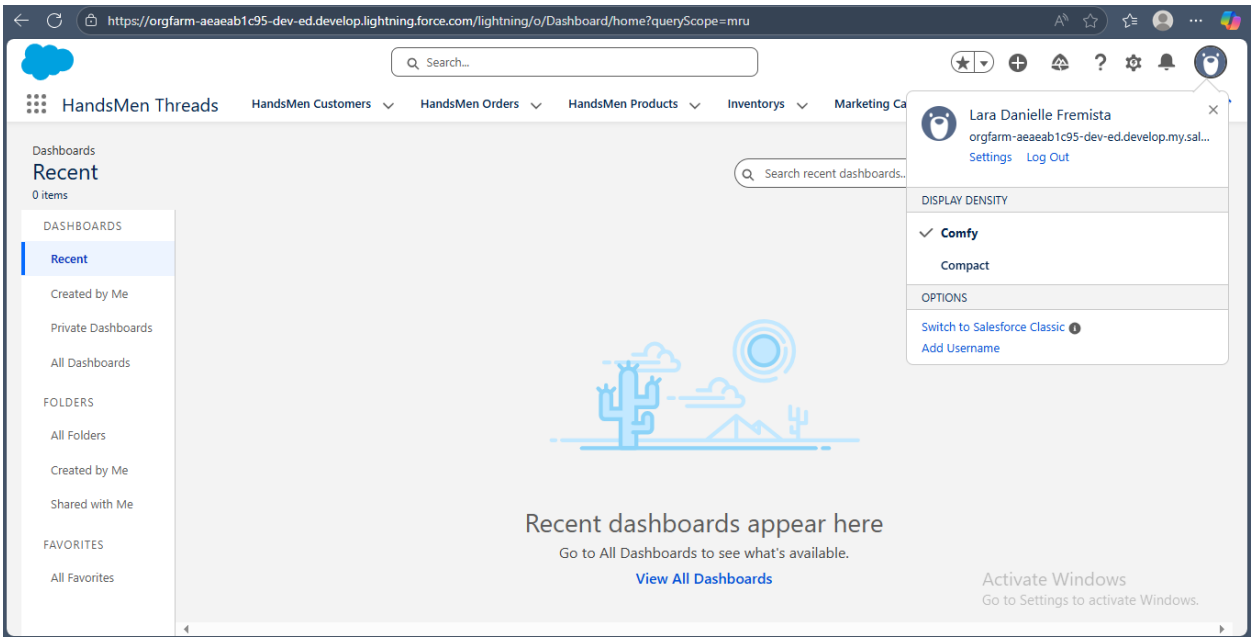




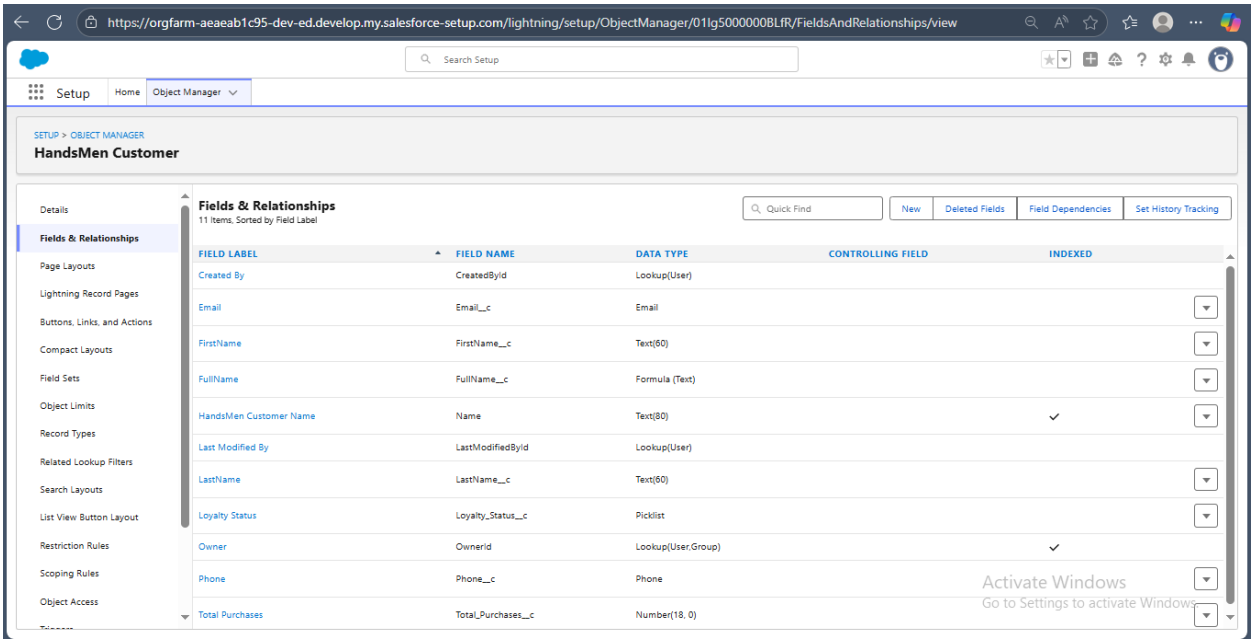
Data Management – Tabs

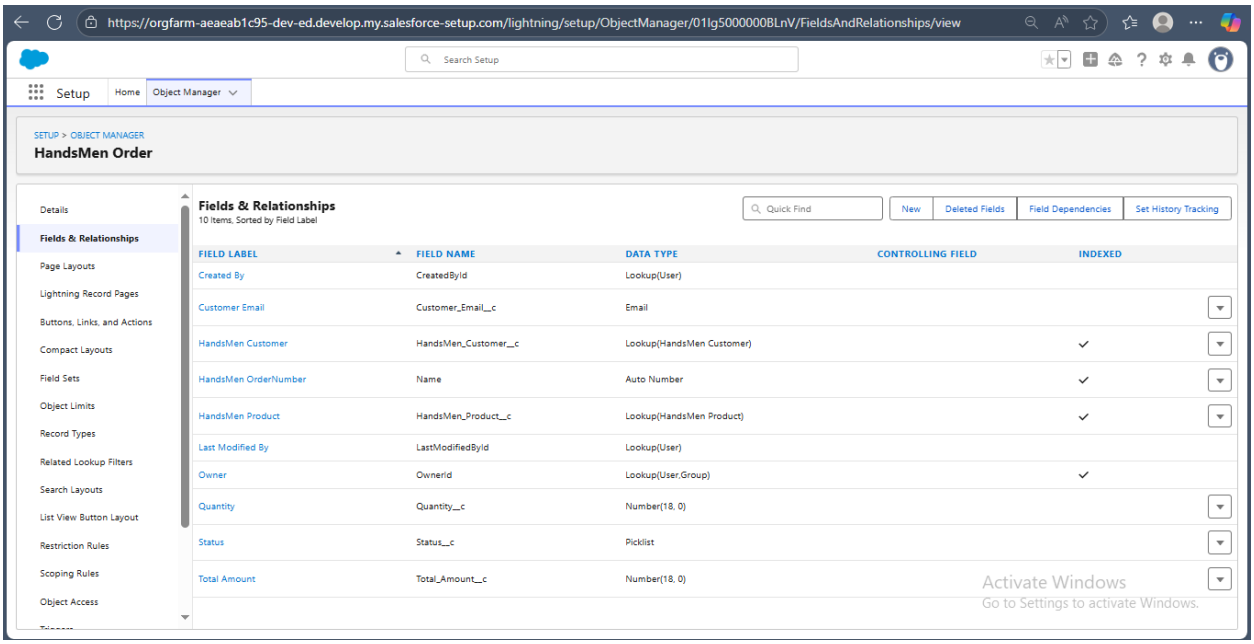


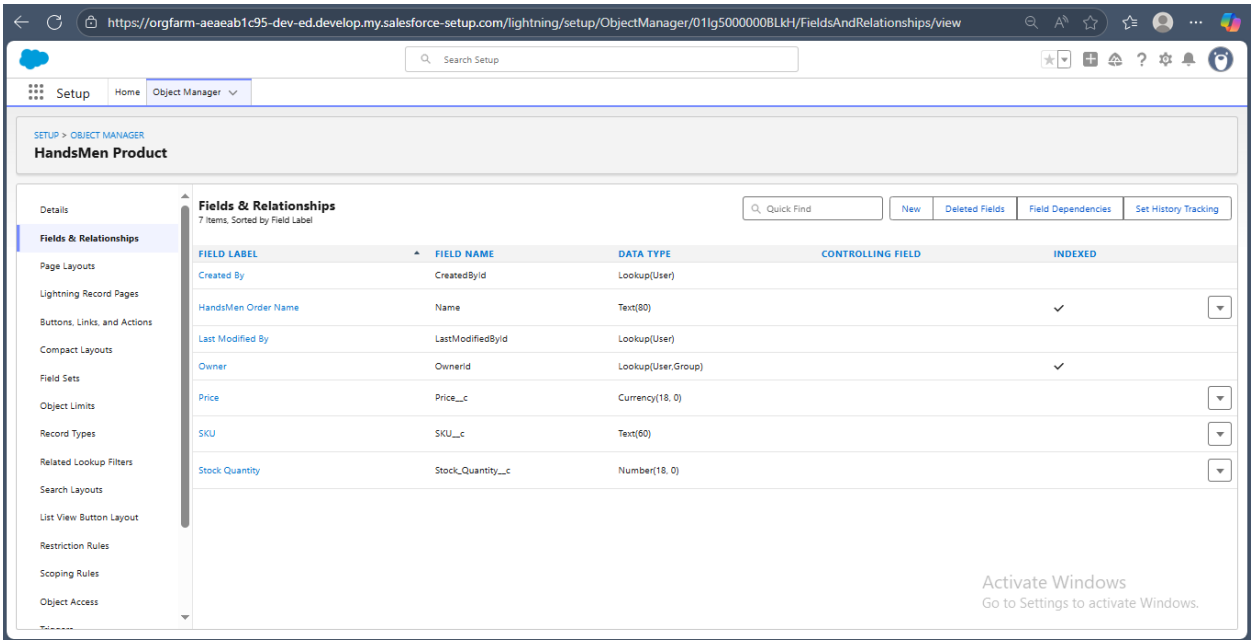
Data Management – App Manager

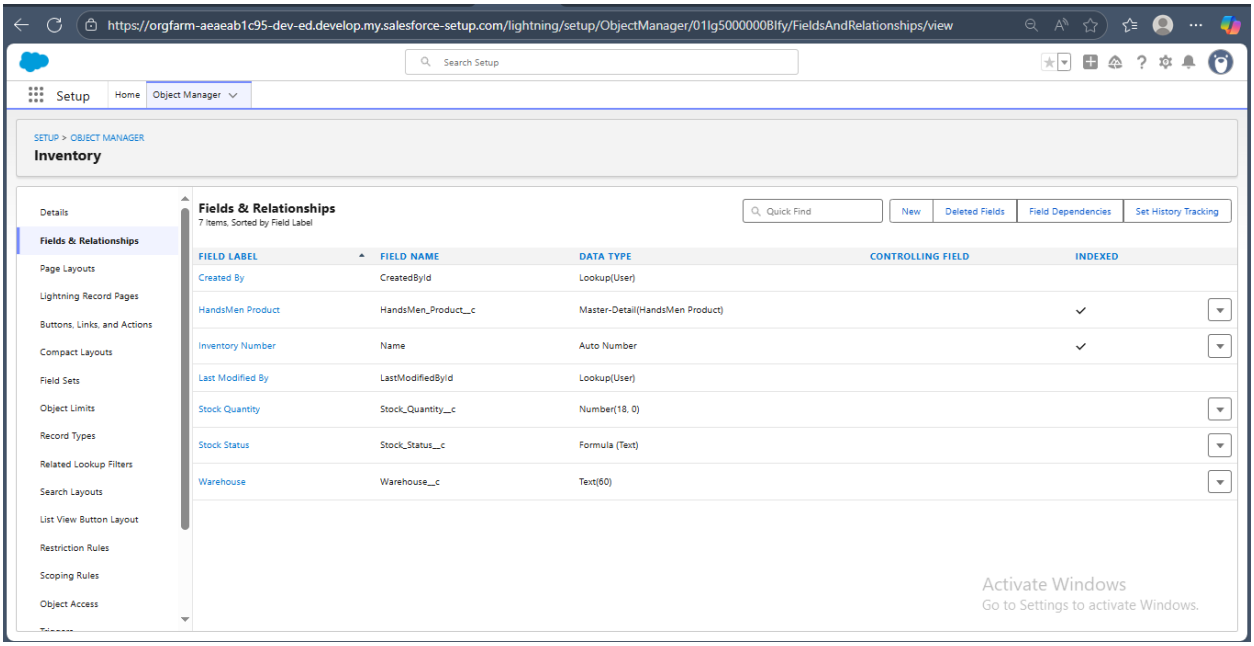


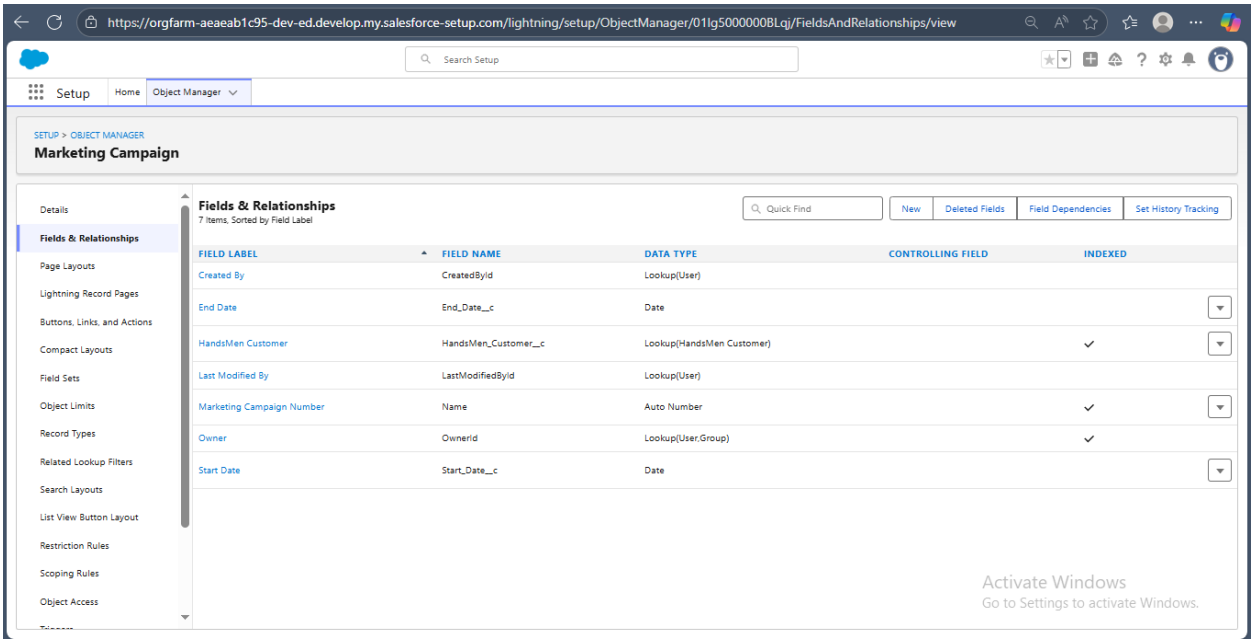
Data Management – Fields


https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ig5000000BLfR/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
HandsMen Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Email
Email__c
Email
FirstName
FirstName__c
Text(60)
FullName
FullName__c
Formula (Text)
HandsMen Customer Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
LastName
LastName__c
Text(60)
Loyalty Status
Loyalty_Status__c
Picklist
Owner
OwnerId
Lookup(User,Group)
Phone
Phone__c
Phone
Total Purchases
Total_Purchases__c
Number(18, 0)
Activate Windows
Go to Settings to activate Windows.


https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ig5000000BLnV/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
HandsMen Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
10 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Customer Email
Customer_Email__c
Email
HandsMen Customer
HandsMen_Customer__c
Lookup(HandsMen Customer)
HandsMen OrderNumber
Name
Auto Number
HandsMen Product
HandsMen_Product__c
Lookup(HandsMen Product)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Quantity
Quantity__c
Number(18, 0)
Status
Status__c
Picklist
Total Amount
Total_Amount__c
Number(18, 0)
Activate Windows
Go to Settings to activate Windows.

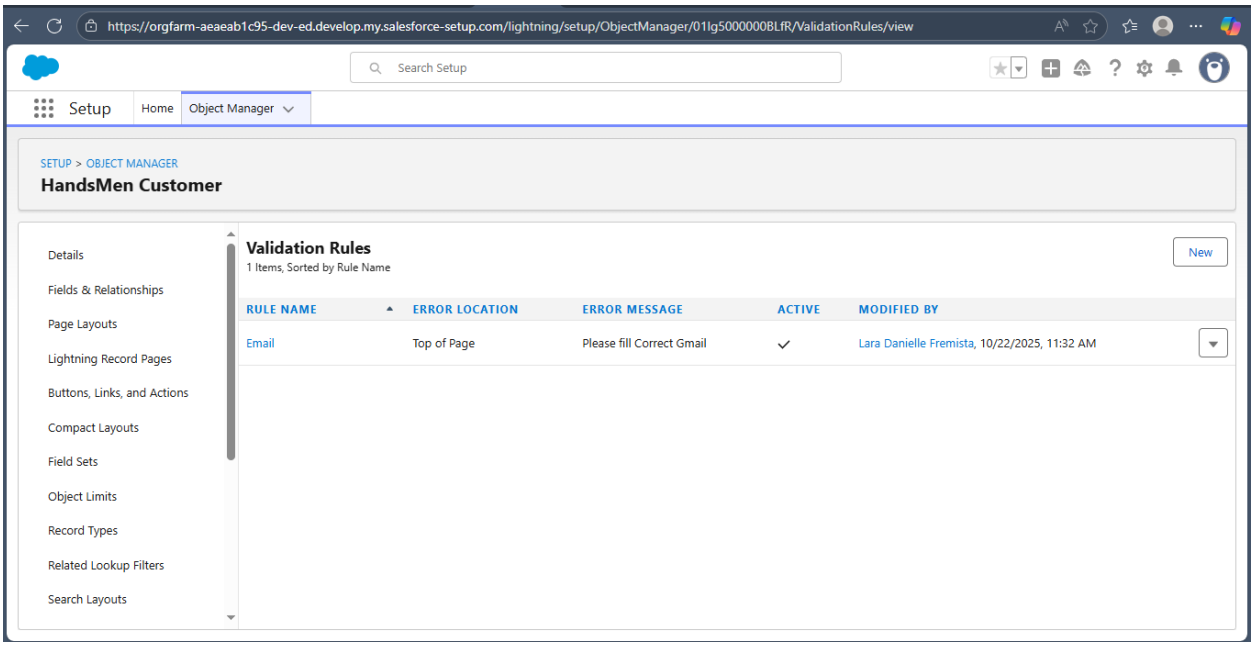

https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ig5000000BLkH/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
HandsMen Product
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
HandsMen Order Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Price
Price__c
Currency(18, 0)
SKU
SKU__c
Text(60)
Stock Quantity
Stock_Quantity__c
Number(18, 0)
Activate Windows
Go to Settings to activate Windows.

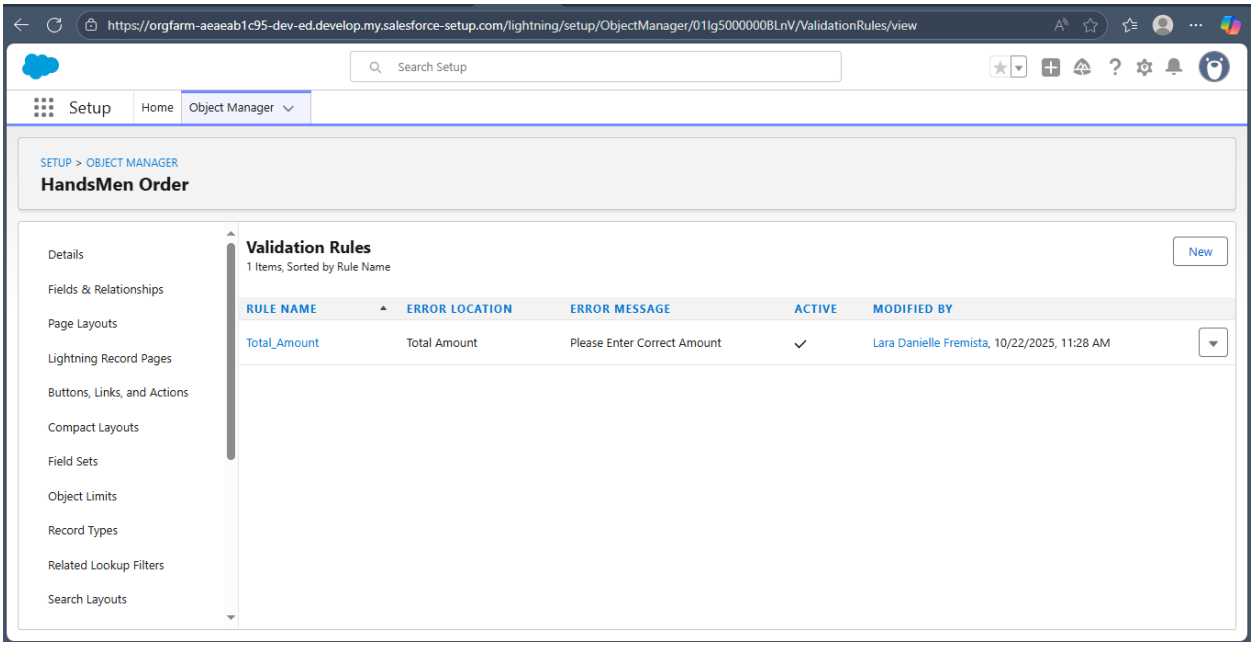

https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ig5000000BIfy/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
HandsMen Product
HandsMen_Product__c
Master-Detail(HandsMen Product)
Inventory Number
Name
Auto Number
Last Modified By
LastModifiedById
Lookup(User)
Stock Quantity
Stock_Quantity__c
Number(18, 0)
Stock Status
Stock_Status__c
Formula (Text)
Warehouse
Warehouse__c
Text(60)
Activate Windows
Go to Settings to activate Windows.

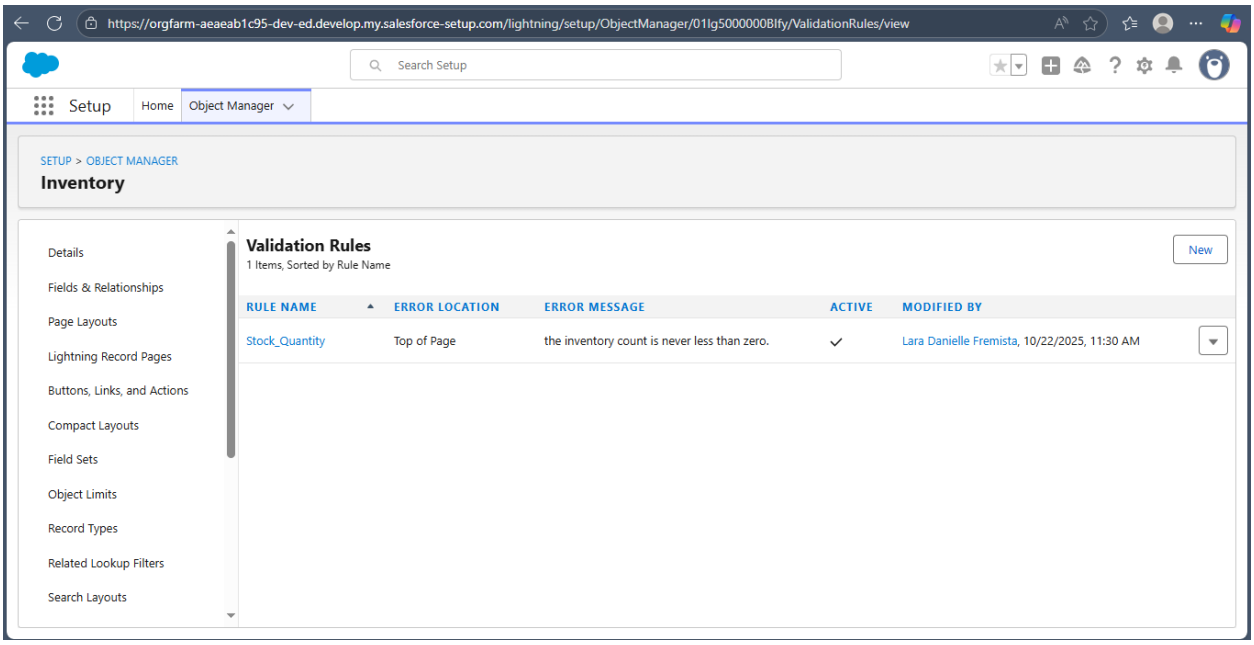


Data Configuration

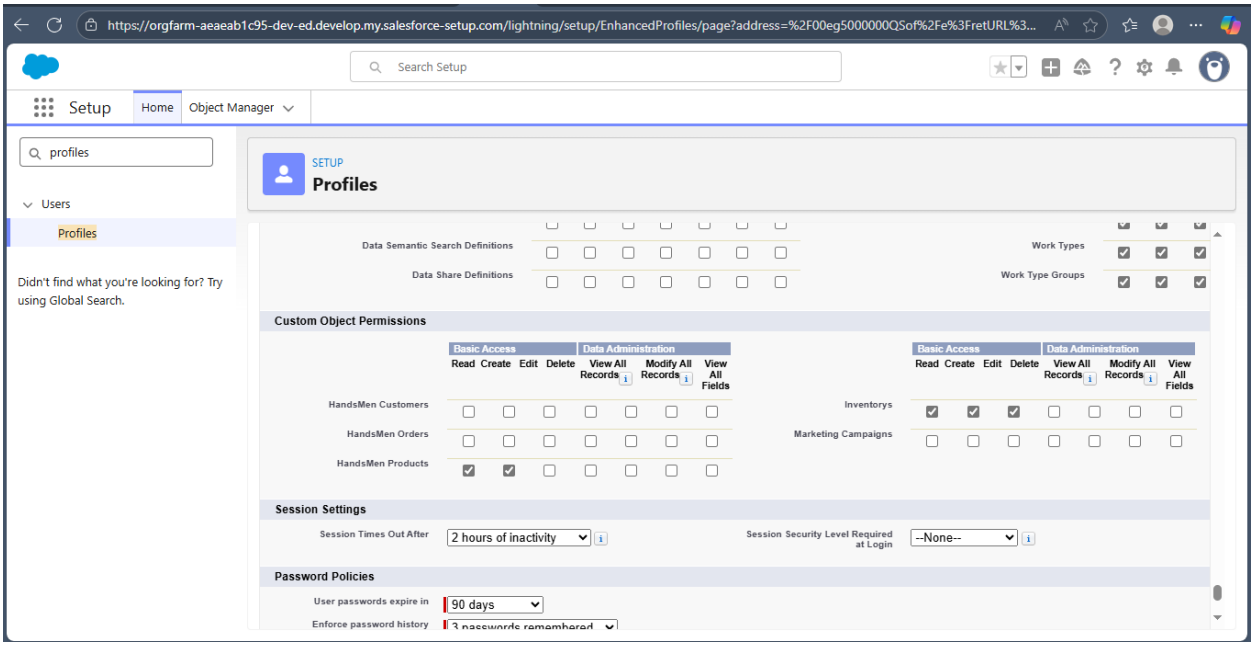
These are the validation rules I added for the objects, but there are no validation rules for Handsmen Product and Marketing Campaign objects.





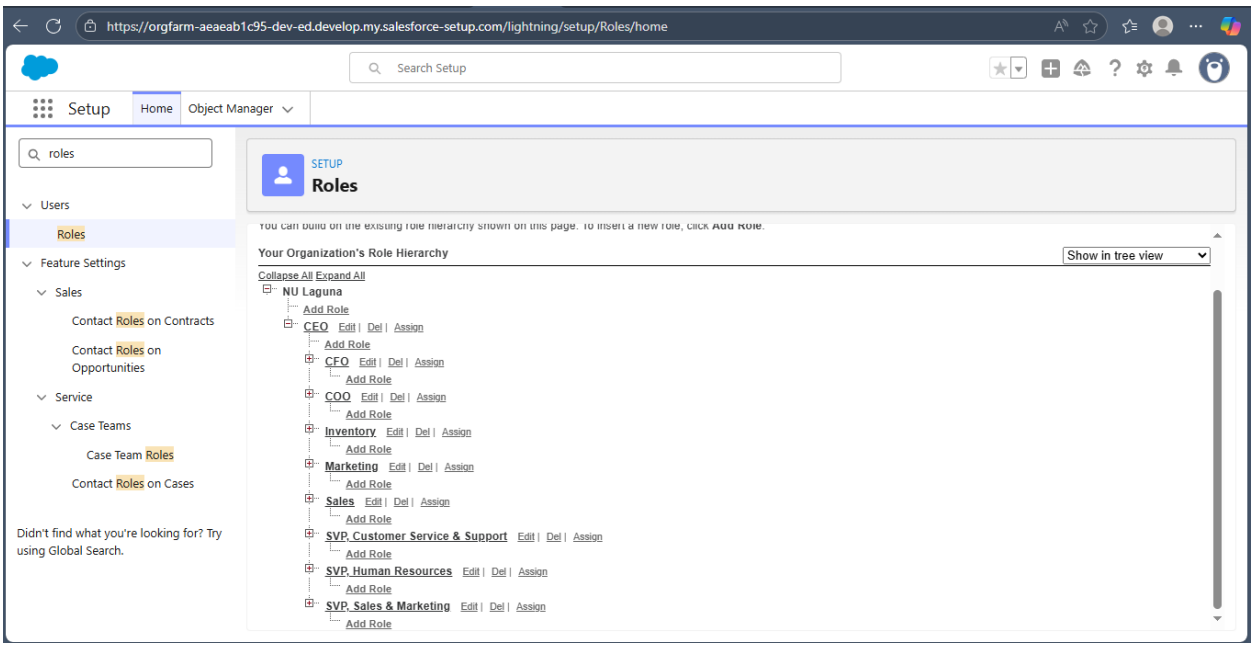


Data security – Profiles



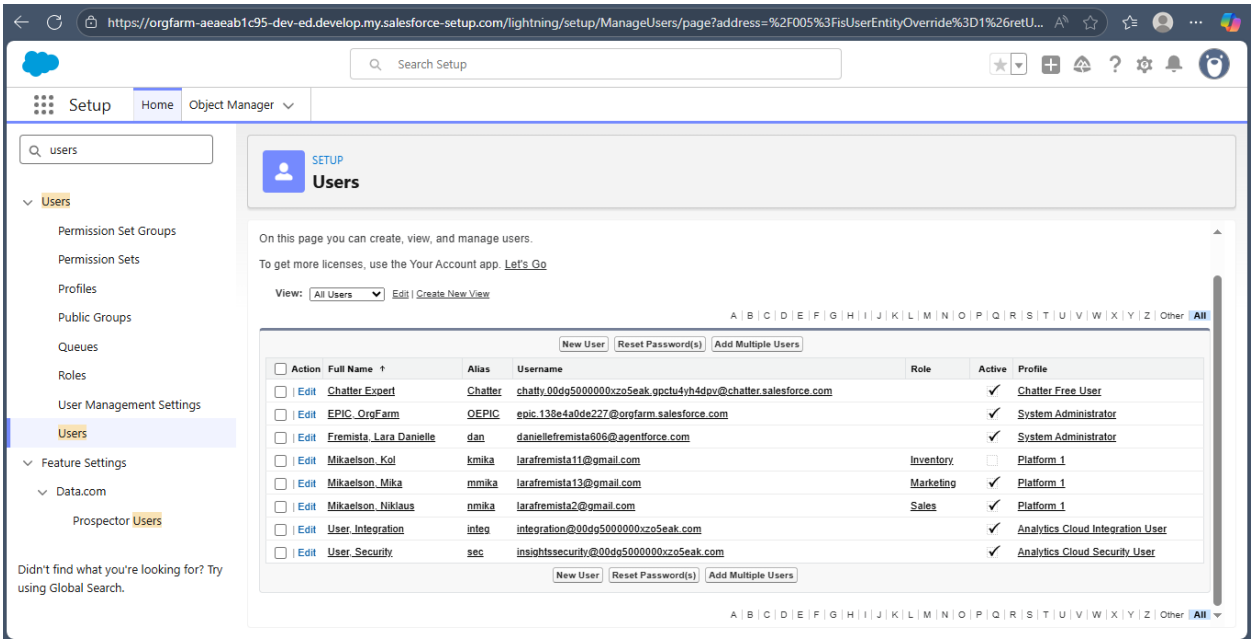
Data Security – Roles

I created a role sales, inventory, and marketing under CEO role.



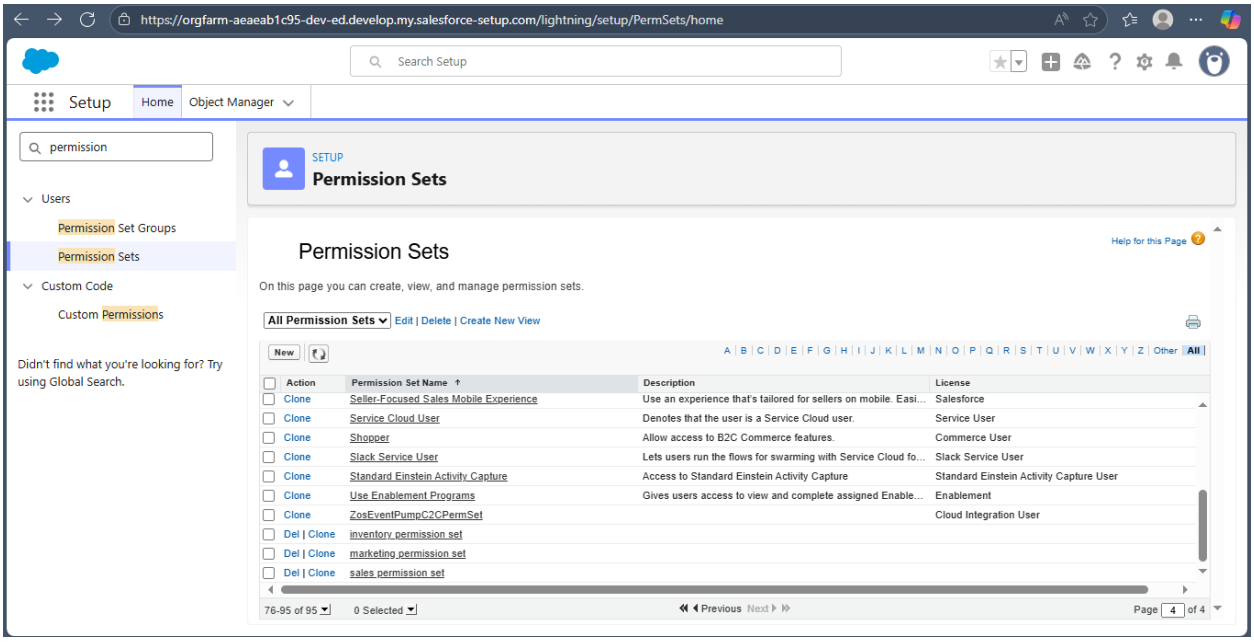
Data Security – Users

I added three users, Kol Mikaelson, Mika Mikaelson, and Niklaus Mikaelson assigned for different three roles: sales, inventory, and marketing.

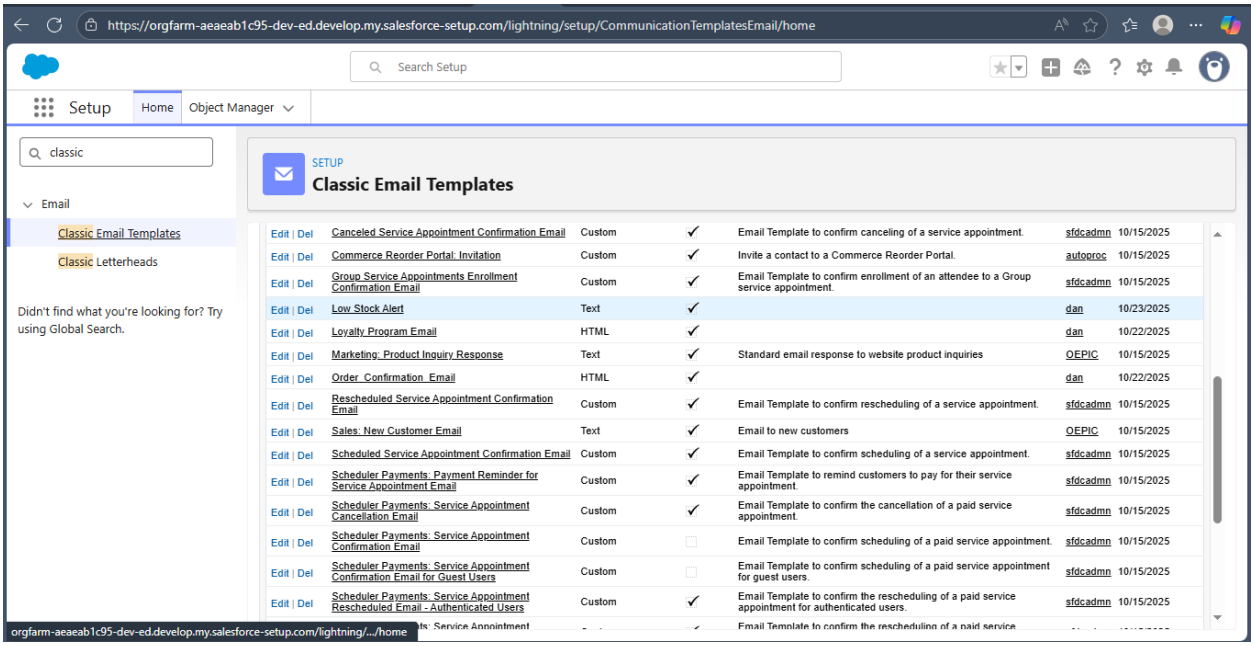


Data Security – Permission Set

Permission sets: inventory permission set, marketing permission set, and sales permission set.

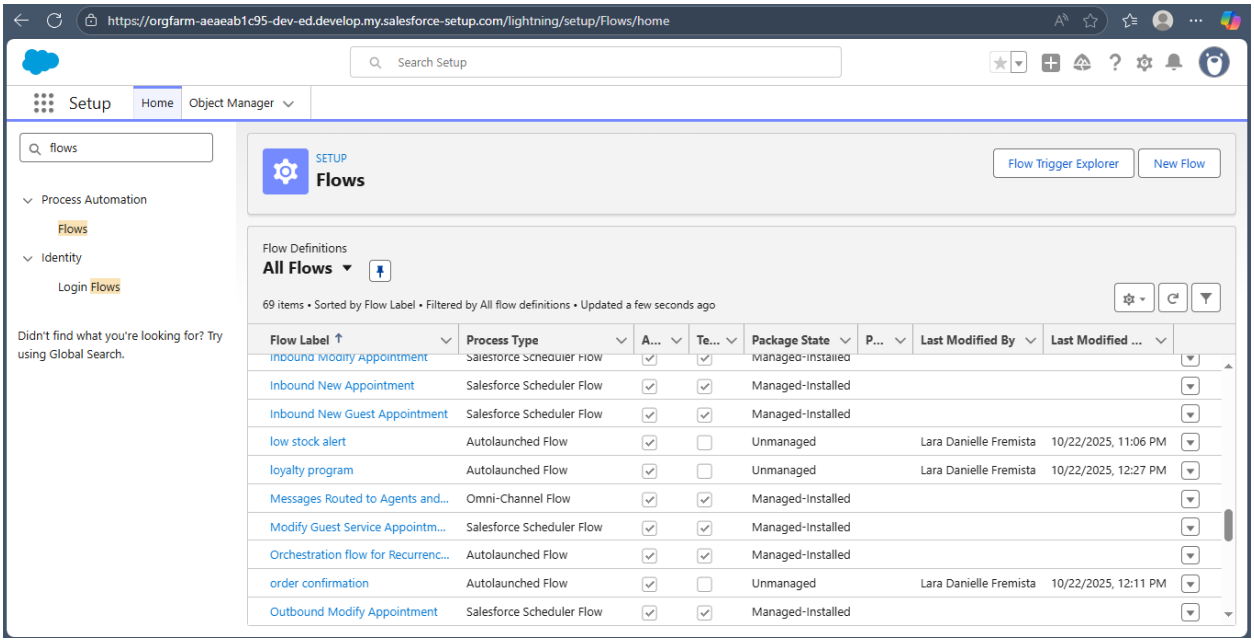


Email Template

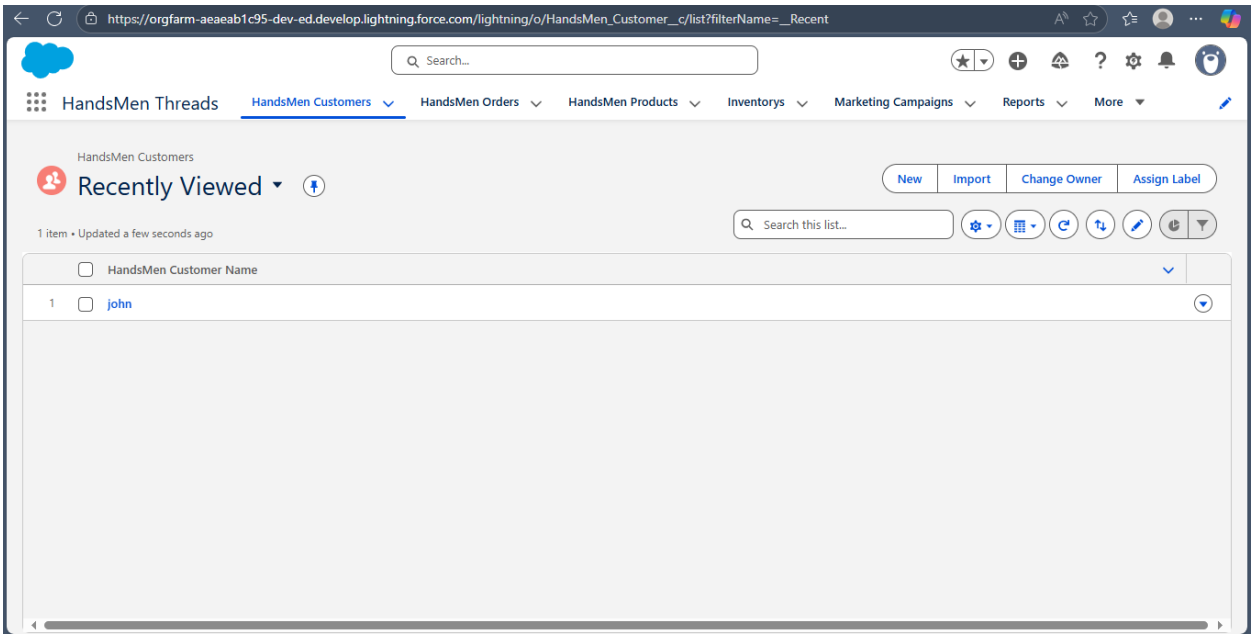


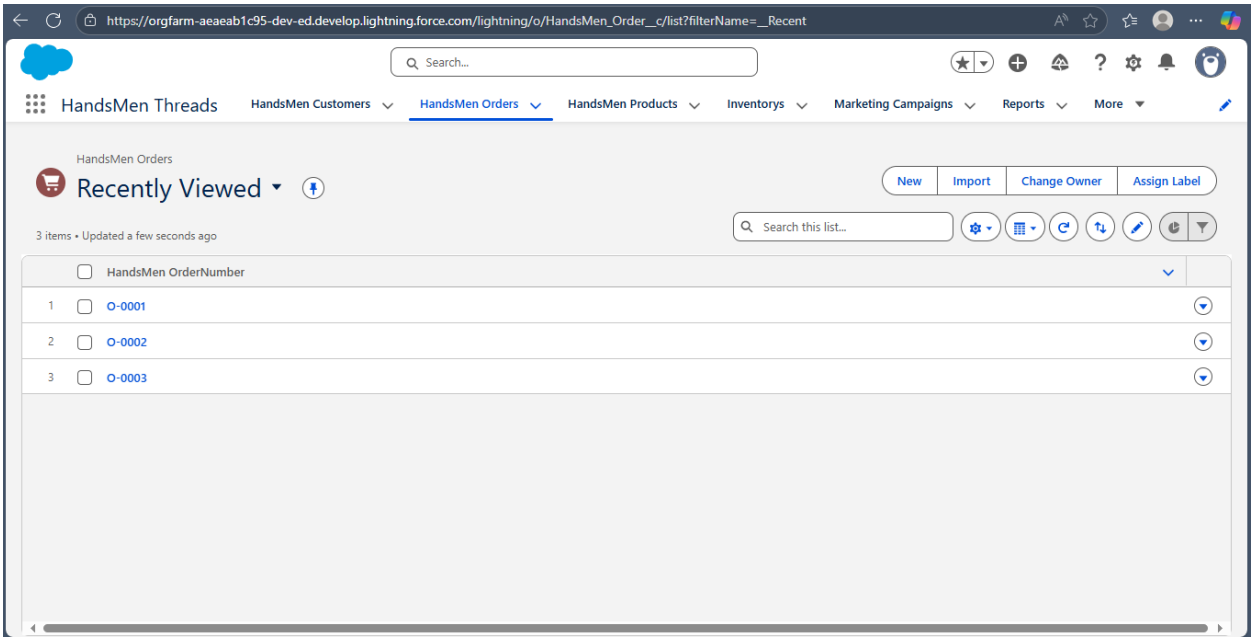
I created an email template: low stock alert email, loyalty program email, and order confirmation email this is to handle the automated emails.

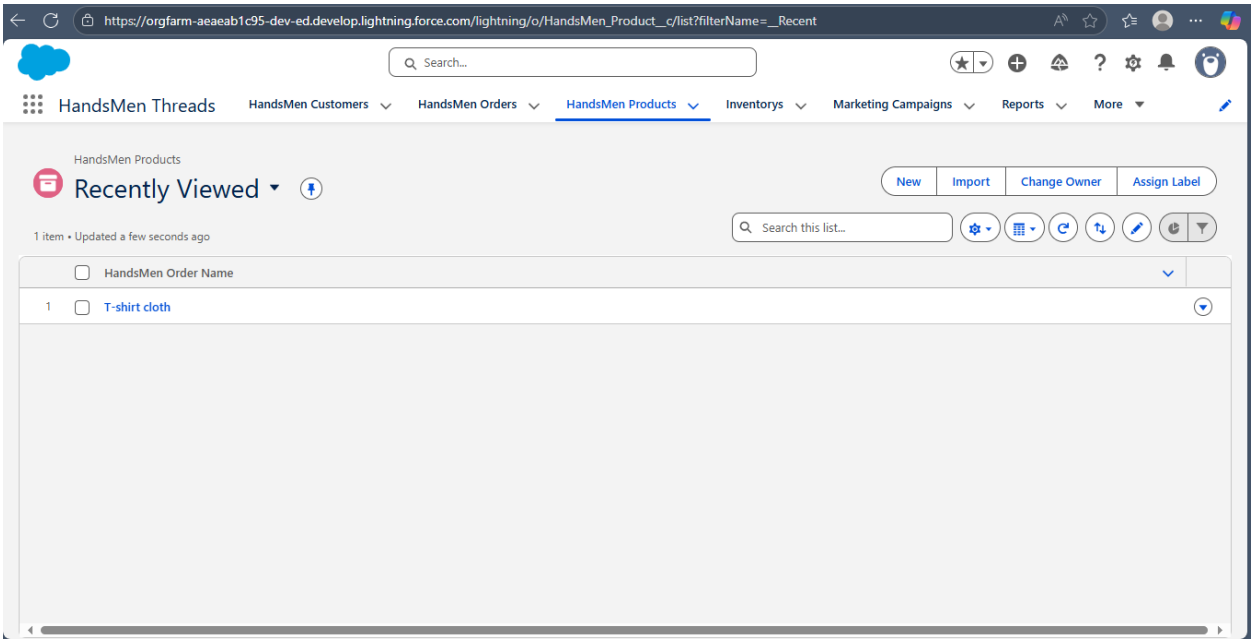
Flows

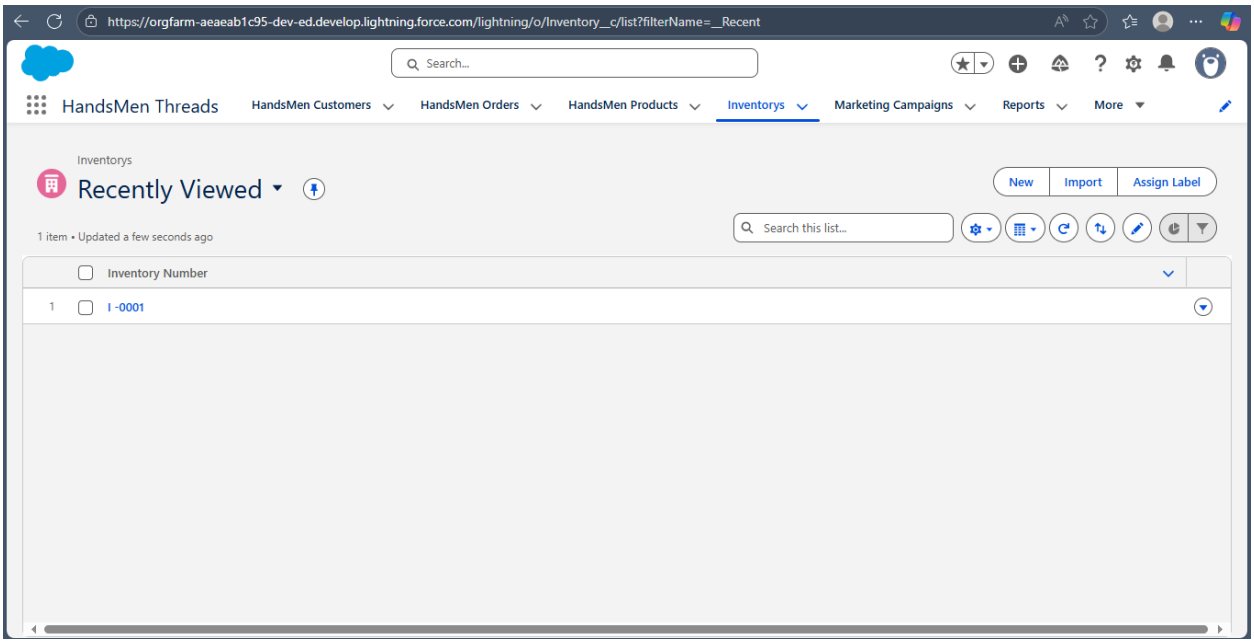


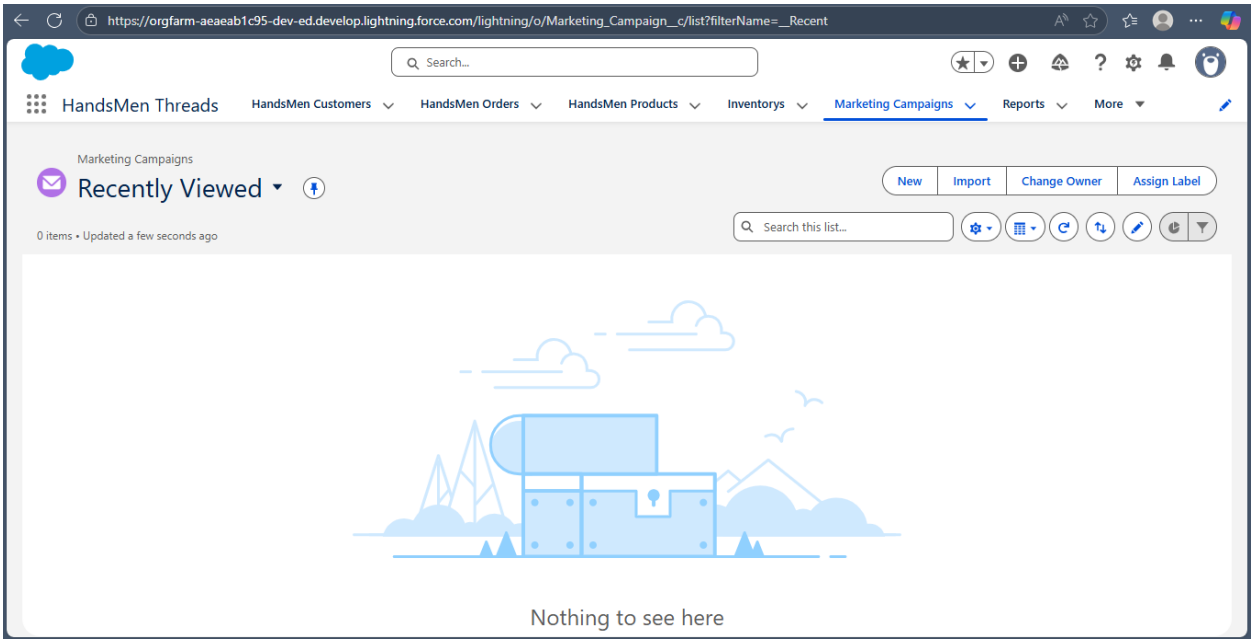
App Manager (Salesforce Concepts)

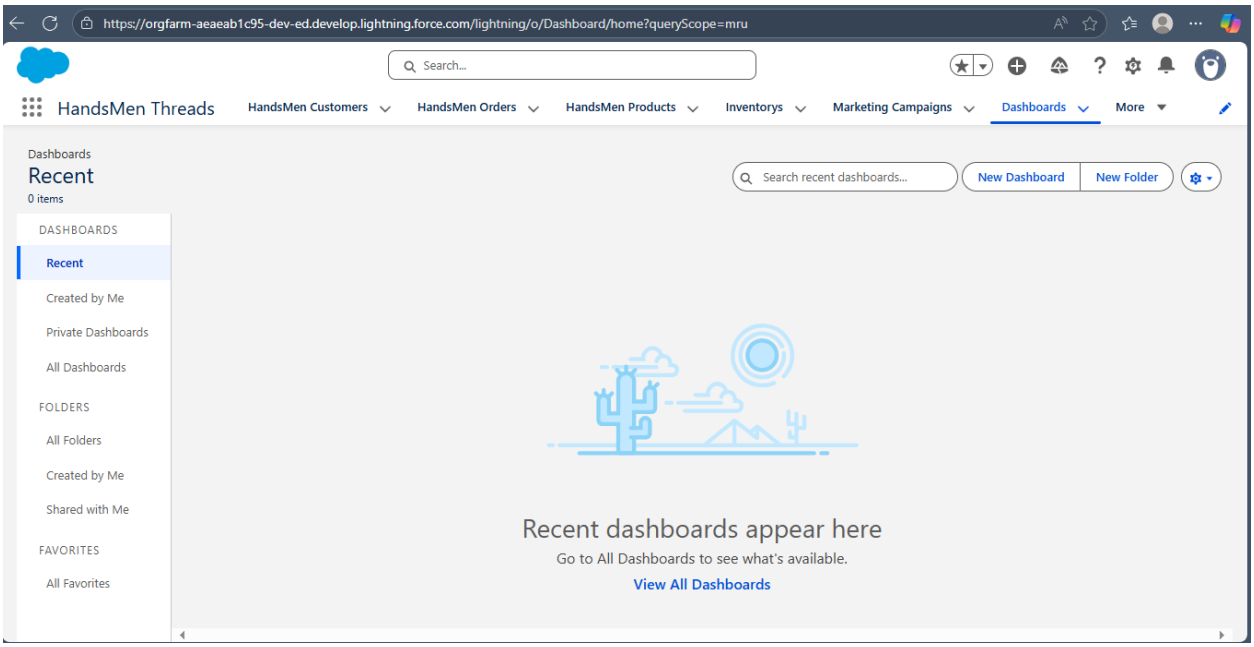

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Customer__c/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
HandsMen Customers
Recently Viewed
New
Import
Change Owner
Assign Label
1 item • Updated a few seconds ago
Search this list...
HandsMen Customer Name
1
john

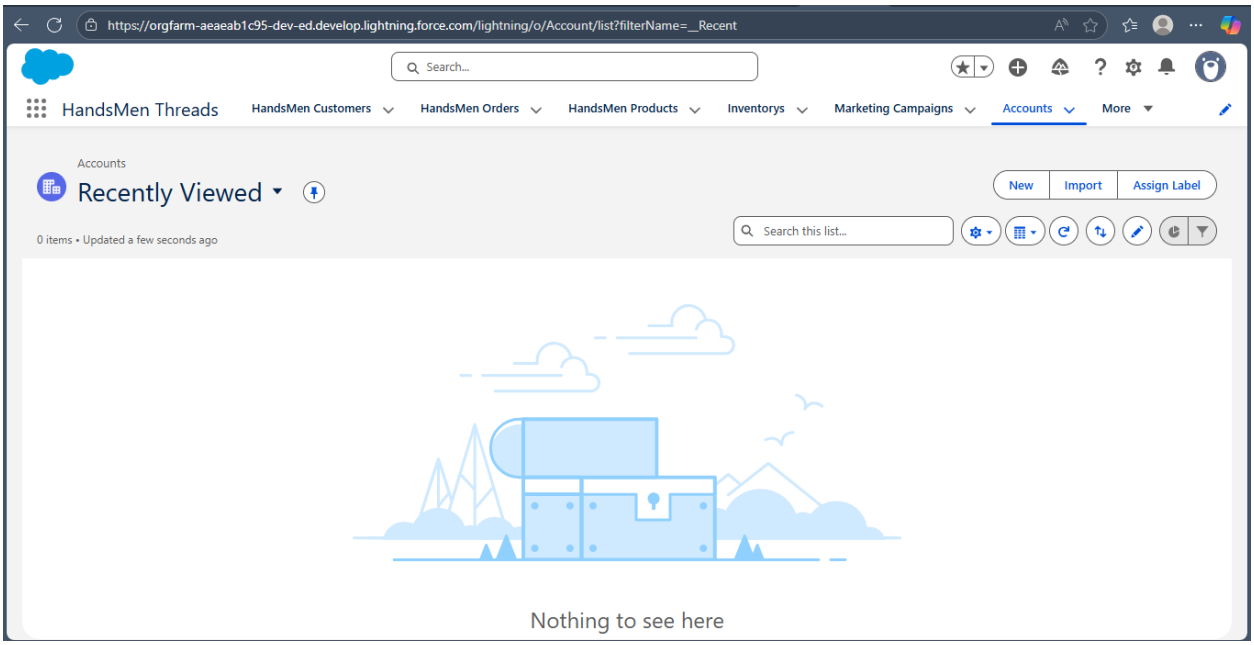

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Order__c/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
HandsMen Orders
Recently Viewed
New
Import
Change Owner
Assign Label
3 items • Updated a few seconds ago
Search this list...
HandsMen OrderNumber
1
O-0001
2
O-0002
3
O-0003

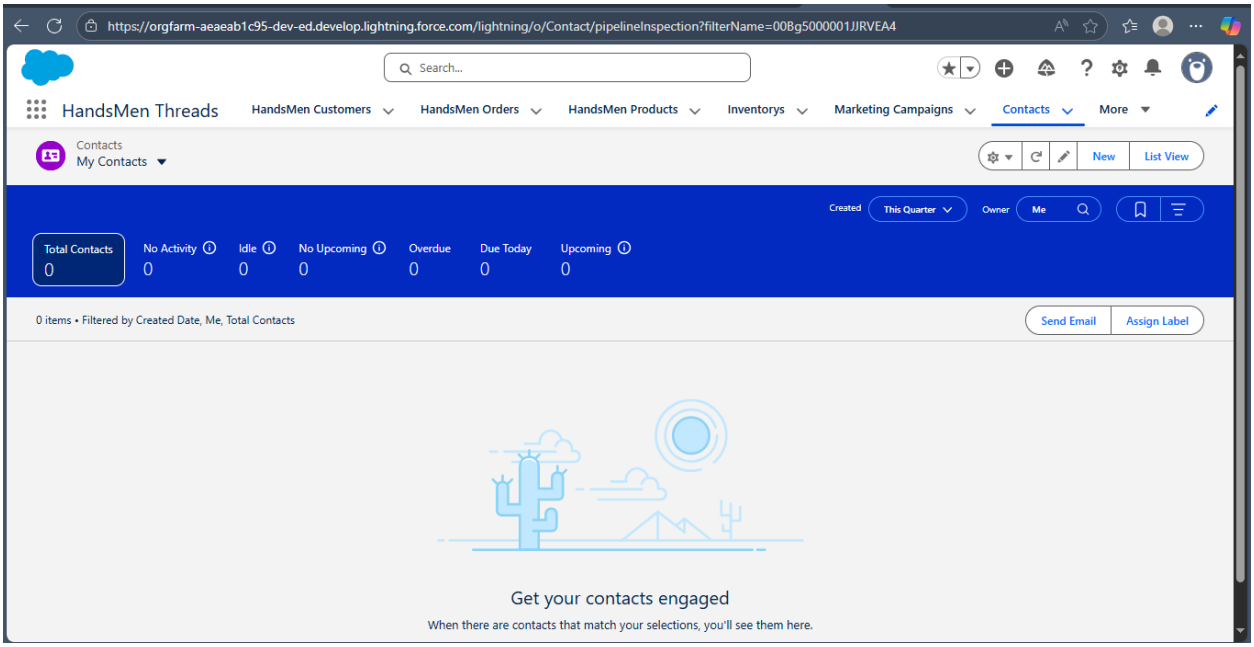

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Product__c/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
HandsMen Products
Recently Viewed
New
Import
Change Owner
Assign Label
1 item • Updated a few seconds ago
Search this list...
HandsMen Order Name
1
T-shirt cloth

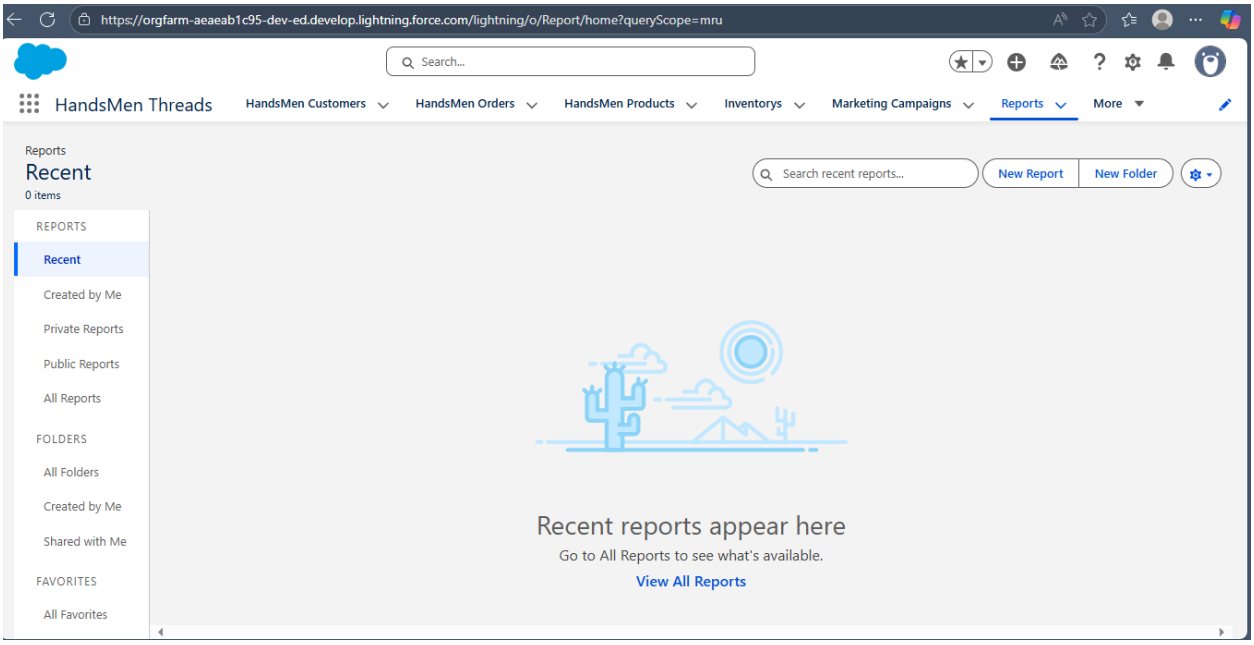

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Inventory__c/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
Inventorys
Recently Viewed
New
Import
Assign Label
1 item • Updated a few seconds ago
Search this list...
Inventory Number
1
I -0001


https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Marketing_Campaign__c/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
Marketing Campaigns
Recently Viewed
0 items • Updated a few seconds ago
New
Import
Change Owner
Assign Label
Search this list...
Nothing to see here

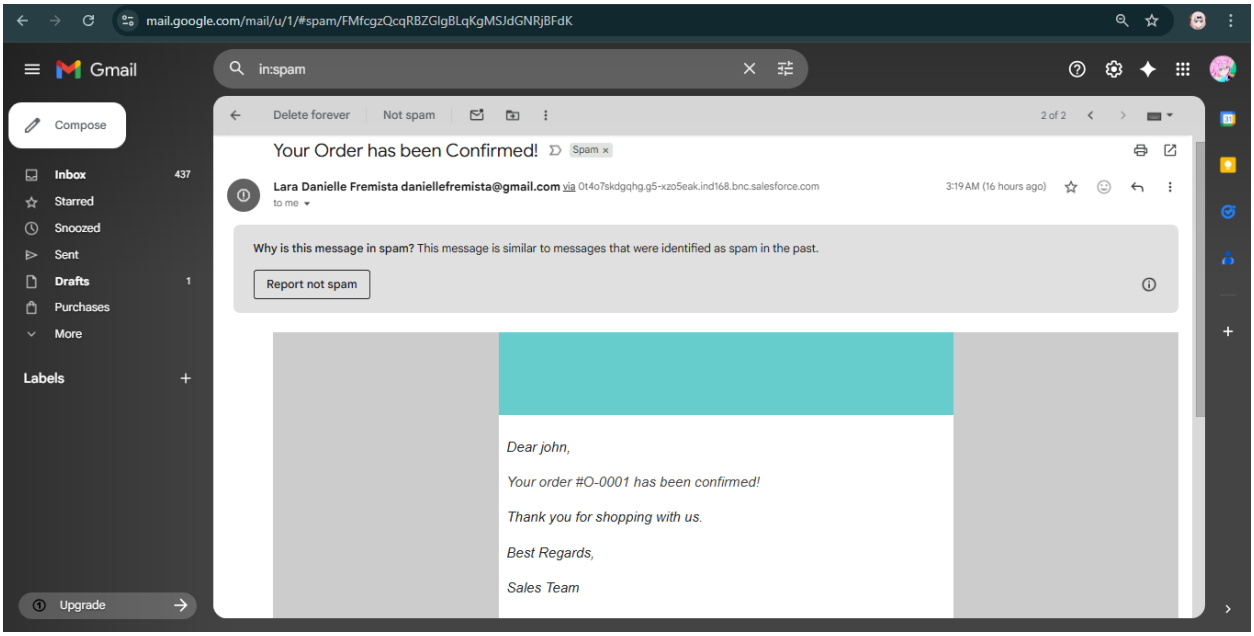

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Dashboards
More
Dashboards
Recent
0 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent dashboards appear here
Go to All Dashboards to see what's available.
View All Dashboards

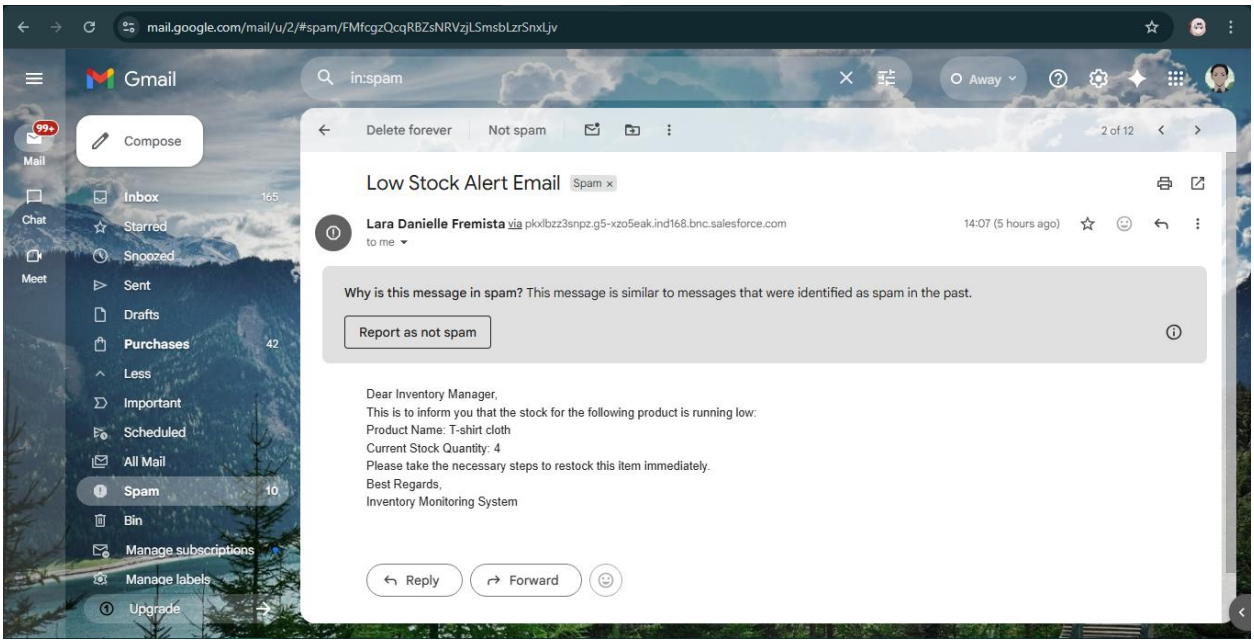

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Account/list?filterName=__Recent
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Accounts
More
Accounts
Recently Viewed
New
Import
Assign Label
0 items • Updated a few seconds ago
Search this list...
Nothing to see here

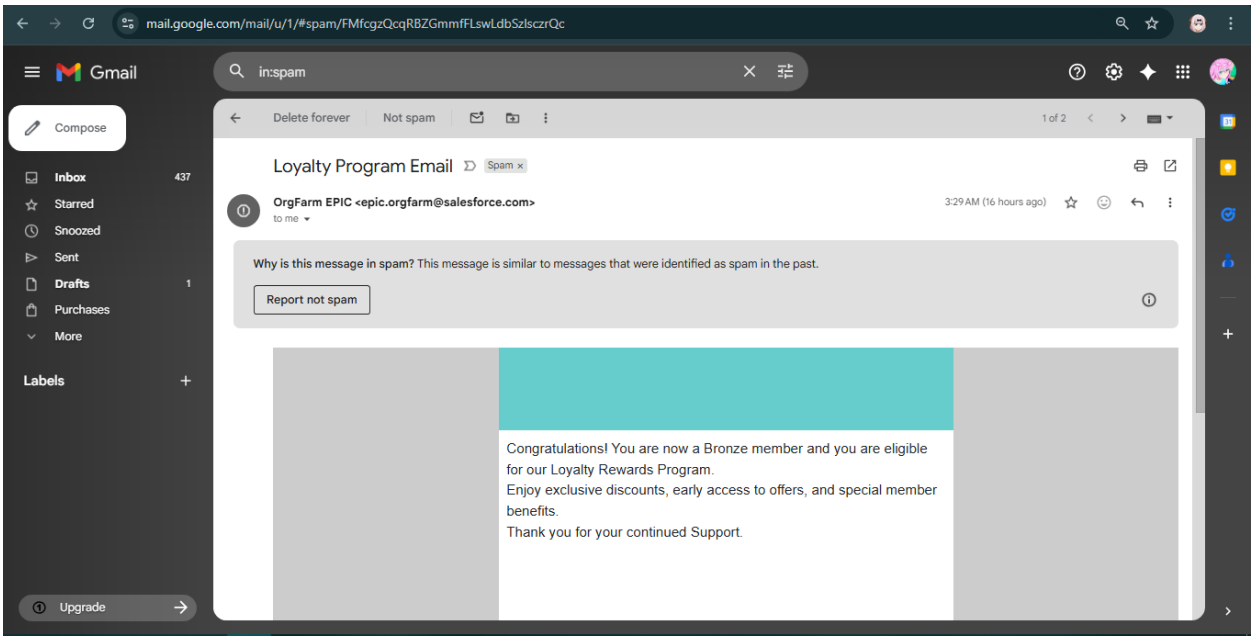

https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Contact/pipelineInspection?filterName=00Bg5000001JJRVEA4
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Contacts
More
Contacts
My Contacts
New
List View
Created
This Quarter
Owner
Me
Total Contacts
0
No Activity
0
Idle
0
No Upcoming
0
Overdue
0
Due Today
0
Upcoming
0
0 items • Filtered by Created Date, Me, Total Contacts
Send Email
Assign Label
Get your contacts engaged
When there are contacts that match your selections, you'll see them here.


https://orgfarm-aeaeab1c95-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
HandsMen Threads
HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
Reports
Recent
0 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent reports appear here
Go to All Reports to see what's available.
View All Reports

Results of Creating Email Template and Flows

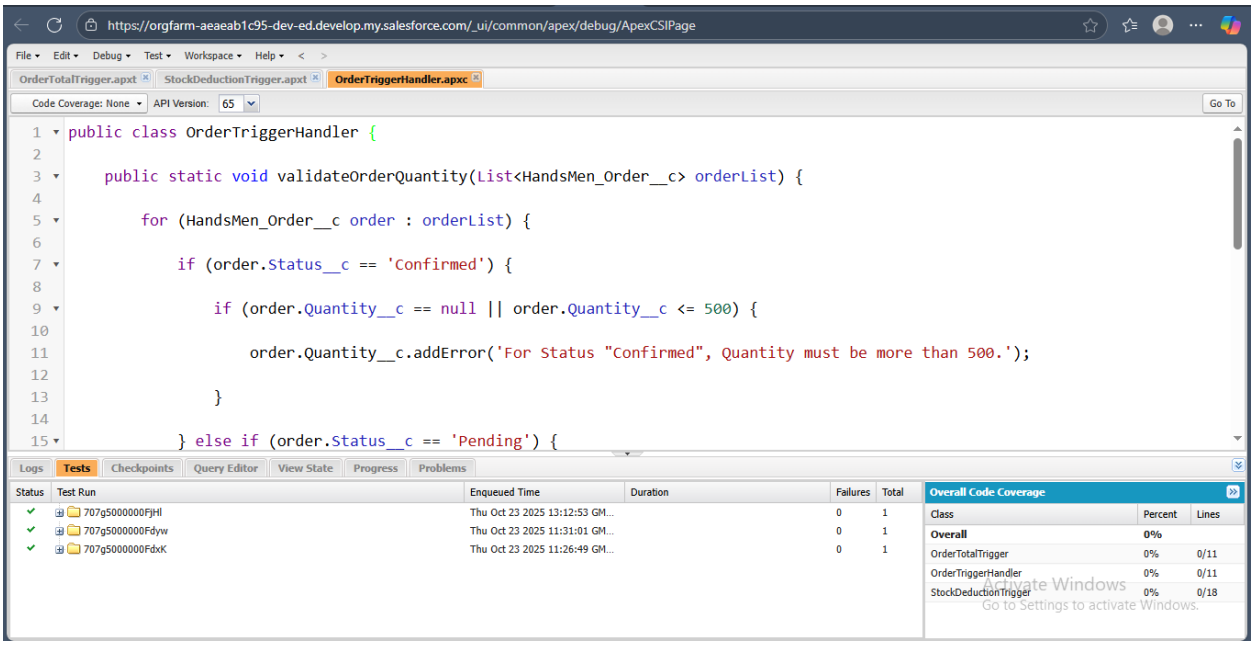


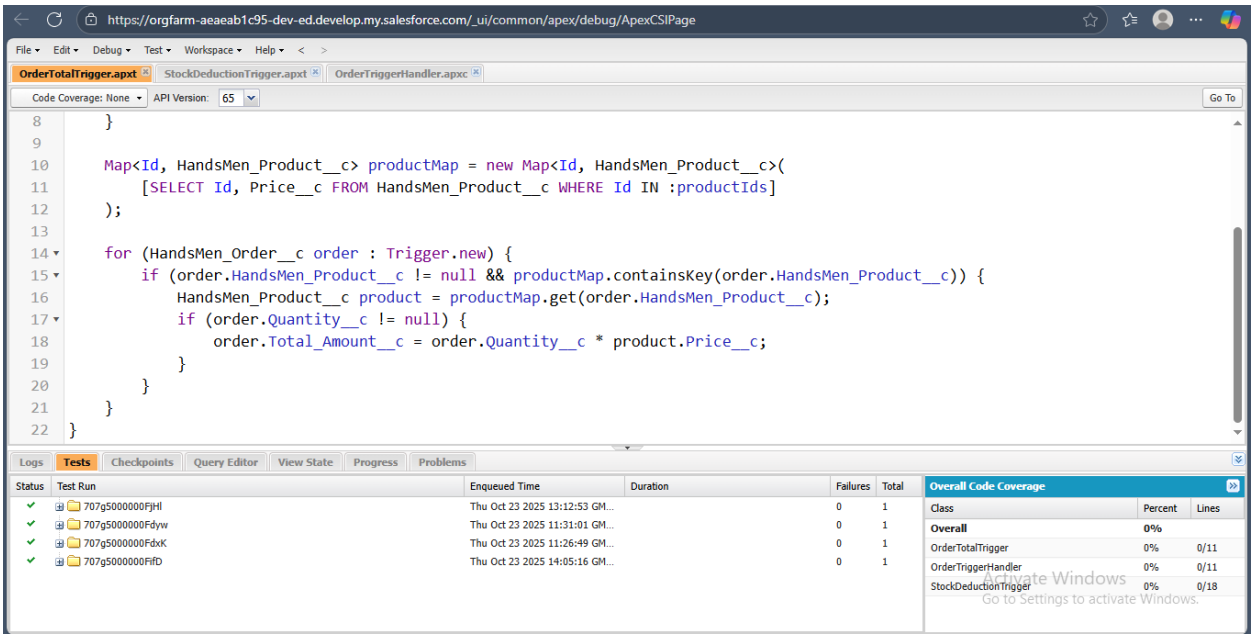


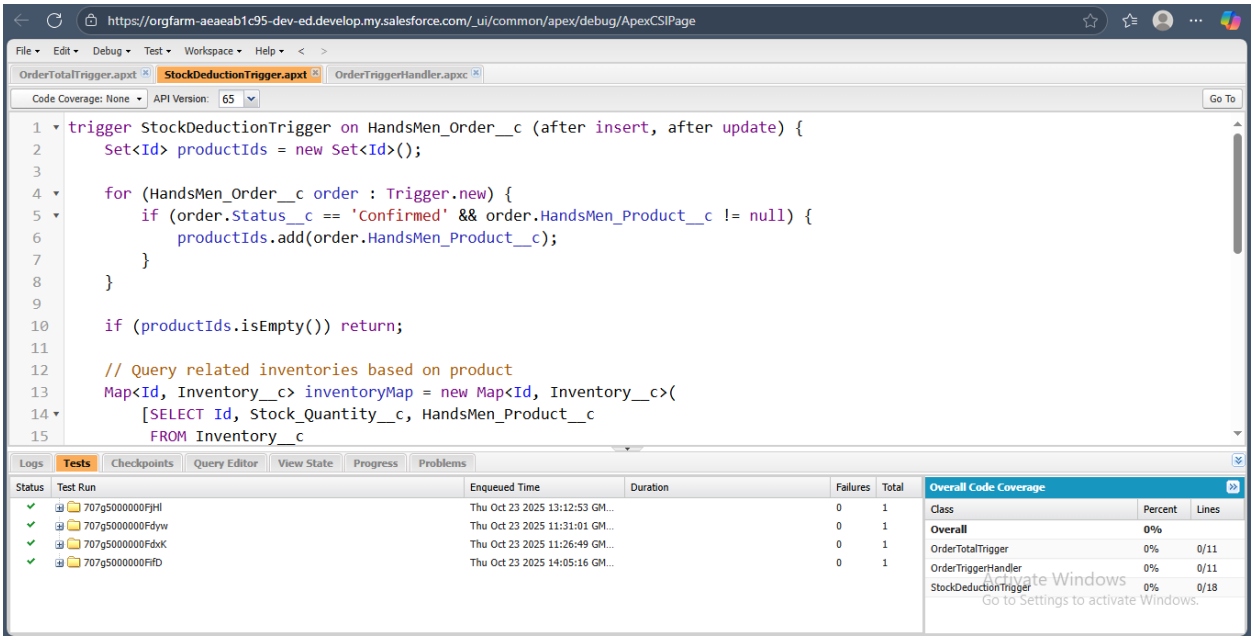


Automation Using Apex (Creating Apex Classes/Triggers)

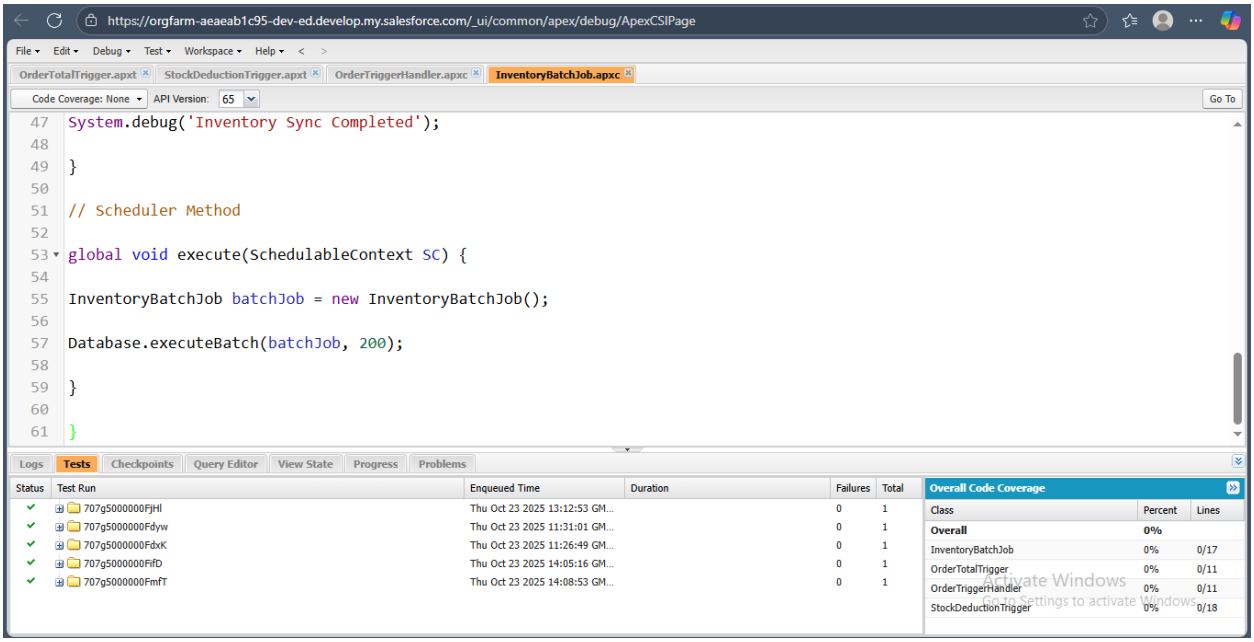
Apex Classes and Trigger




https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
OrderTotalTrigger.apxt
StockDeductionTrigger.apxt
OrderTriggerHandler.apxc
Code Coverage: None
API Version: 65
Go To
}
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;
}
}
}
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Status
Test Run
Enqueued Time
Duration
Failures
Total
707g5000000FjHl
707g5000000Fdyw
707g5000000FdxK
707g5000000FifD
Thu Oct 23 2025 13:12:53 GM...
Thu Oct 23 2025 11:31:01 GM...
Thu Oct 23 2025 11:26:49 GM...
Thu Oct 23 2025 14:05:16 GM...
Overall Code Coverage
Class
Percent
Lines
Overall
0%
OrderTotalTrigger
0%
0/11
OrderTriggerHandler
0%
0/11
StockDeductionTrigger
0%
0/18
Activate Windows
Go to Settings to activate Windows.


https://orgfarm-aeaeab1c95-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
OrderTotalTrigger.apxt
StockDeductionTrigger.apxt
OrderTriggerHandler.apxc
Code Coverage: None
API Version: 65
Go To
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, HandsMen_Product__c
FROM Inventory__c
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Status
Test Run
Enqueued Time
Duration
Failures
Total
707g5000000FjHl
707g5000000Fdyw
707g5000000FdxK
707g5000000FifD
Thu Oct 23 2025 13:12:53 GM...
Thu Oct 23 2025 11:31:01 GM...
Thu Oct 23 2025 11:26:49 GM...
Thu Oct 23 2025 14:05:16 GM...
Overall Code Coverage
Class
Percent
Lines
Overall
0%
OrderTotalTrigger
0%
0/11
OrderTriggerHandler
0%
0/11
StockDeductionTrigger
0%
0/18
Activate Windows
Go to Settings to activate Windows.

Batchjobs



Conclusion

The Salesforce CRM implementation for HandsMen Threads enhanced operational workflows, improved data accuracy, and strengthened customer relationships. The system delivers an automated and secure solution tailored to the business's growing needs in the fashion business industry.