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

A Written Report Submitted in Partial Fulfillment of the Requirements for the Salesforce Internship (Smartbridge) and IT Elective 4 course

Submitted by:
Erika K. Quizon
Bachelor of Science in Information Technology 4-1
Polytechnic University of the Philippines
Santa Maria Campus

Table of Contents

OVERVIEW

HandsMen Threads, an organization in the fashion industry, is taking its initiative to improve their business processes and customer relationship by utilizing the power of Salesforce. This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads.

The project focuses on developing solutions that involves designing and implementing a comprehensive data model capable of storing and managing all crucial objects: Orders, Customers, Products, Inventory, and Marketing Campaign. Additionally, beyond data structuring, business processes were also utilizing automation using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure the reliability and integrity of data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. This is to ensure that only validated data will be recorded and only those authorized entity will be able to perform operations. The solution also includes a scheduled batch job using Apex to update low stock quantities.

Overall, this end-to-end CRM implementation aims at improving customer experience by developing a unified and customer-centric Salesforce platform that supports HandsMen Thread's business processes.

OBJECTIVE

General Objective

The main objective of this project is to develop and implement a customized Salesforce CRM platform for HandsMen Threads to improve data integrity, and automate key business processes to enhance customer engagement and operations.

Specific Objectives

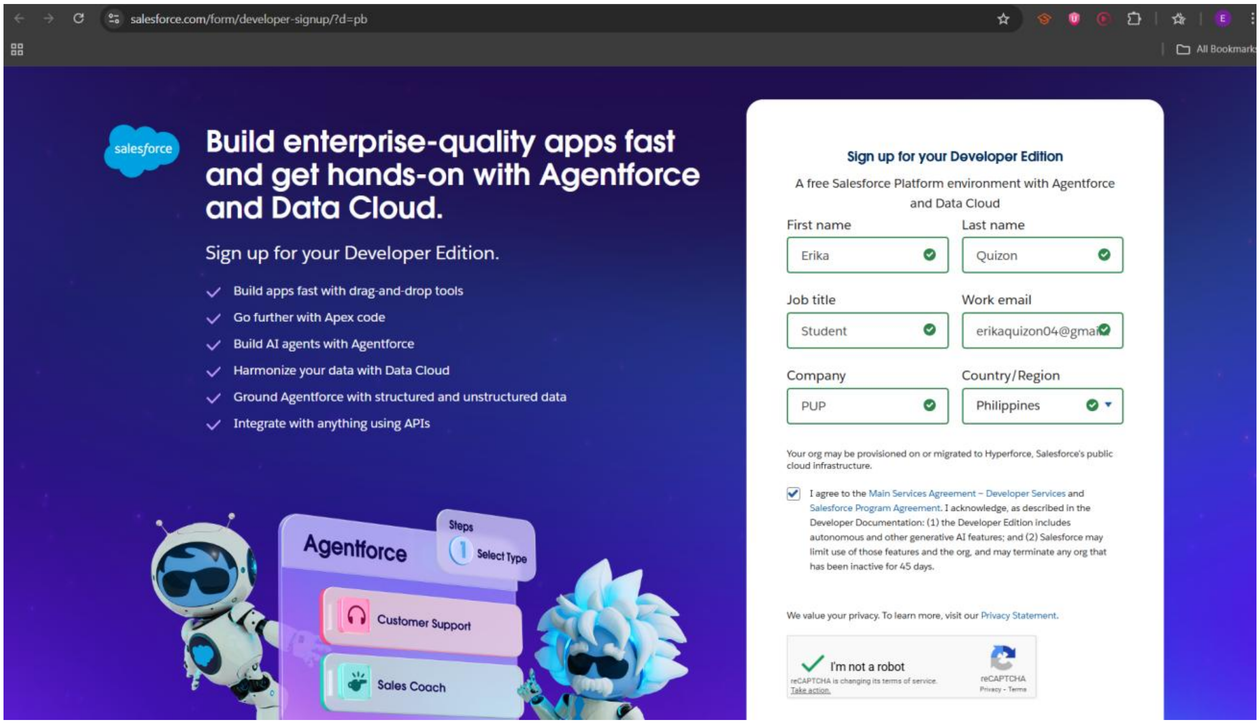
Specifically, by building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

1. Design and implement a scalable Salesforce data model that supports all relevant business entities, relationships, and workflows;
2. Ensure accurate and consistent data entry using validation rules.
3. Automate key processes using Record-Triggered Flows and Scheduled Flows, including order confirmation, loyalty status updates, and stock alerts.
4. Develop Apex classes and triggers to address advanced business logic.
5. Improve customer satisfaction and engagement through timely communication and a dynamic loyalty system.
6. Improve internal team coordination through role-based access control.

EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using https://developer.salesforce.com/signup.
- After submission, the verification email was received, the account was activated, and the password was set.
- Upon activiation, access was granted to the Salesforce Setup Home page.



2. Custom Object Creation

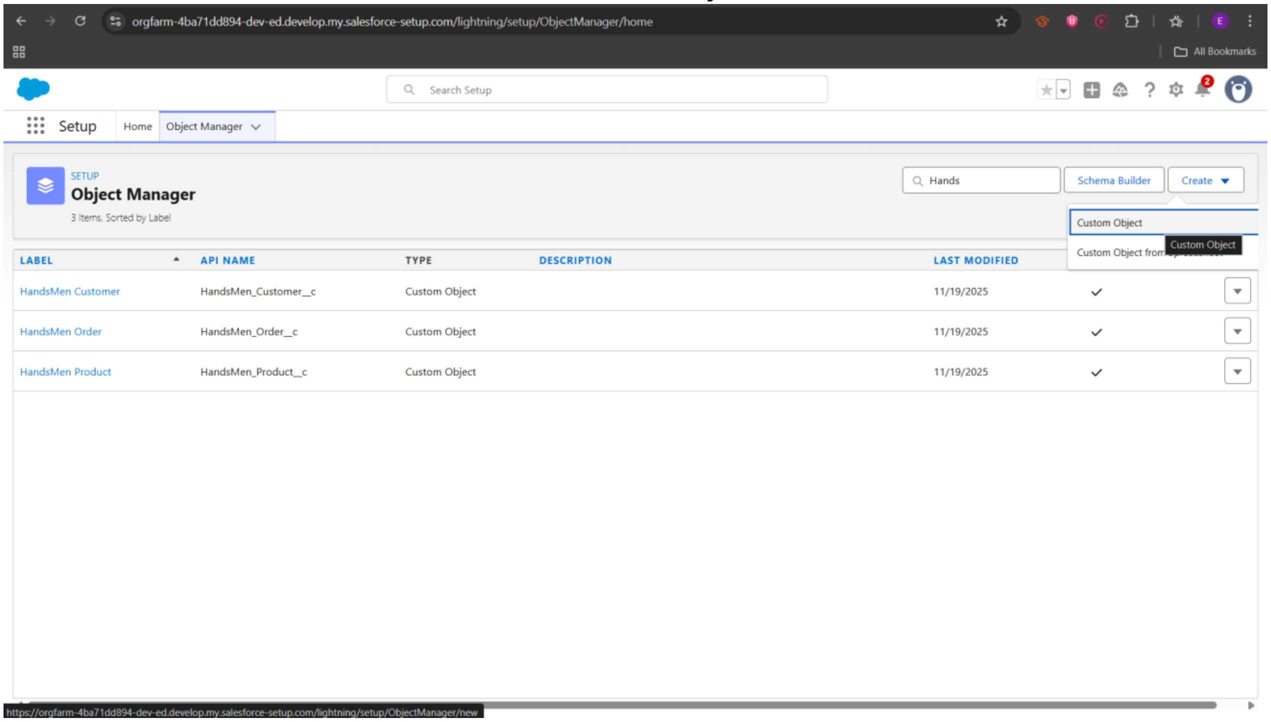
Five custom objects were created to store business-critical data:

Custom Object	Purpose
HandsMen Customer	Stores customer data such as name, email, phone, and loyalty status.
HandsMen Product	Stores product catalog details like price, SKU.
HandsMen Order	Stores order information such as customer, quantity, and order status.
Inventory	Tracks product stock levels and warehouse information.
Marketing Campaign	Stores promotional campaign details and marketing activities.

Steps to Create Custom Object:

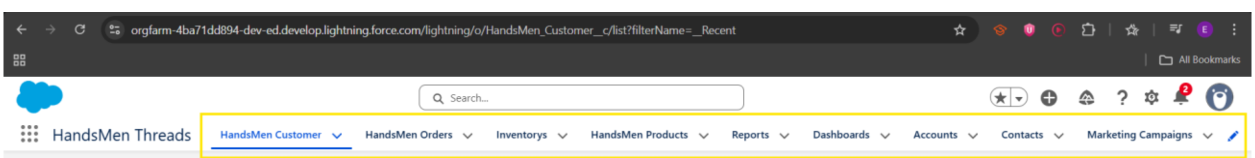
- Navigated to Setup → Object Manager → Create → Custom Object

- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



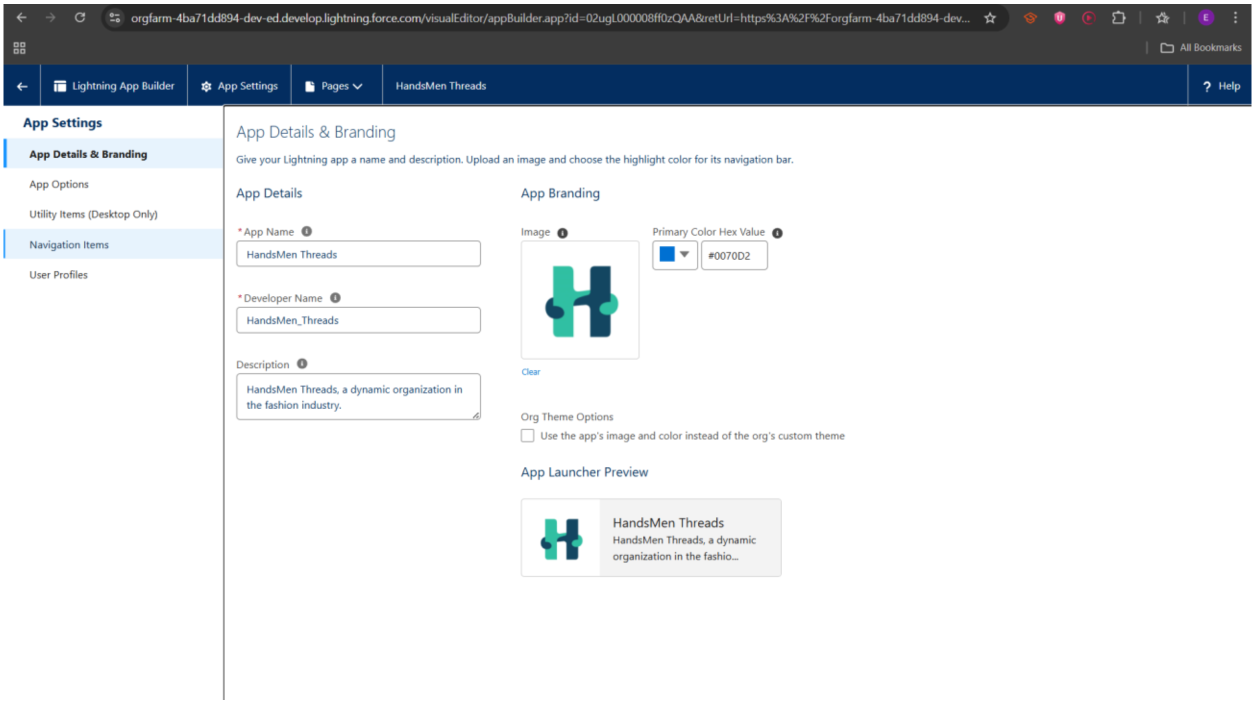
Steps to Add Tabs for each Custom Object:

- Go to Setup → Quick Find → Tabs
- Under Custom Object Tabs, click New
- Select Custom Objects
- Choose any Tab Style
- On "Add to Profiles" page → Keep default settings → Next
- On "Add to Custom Apps" page → Keep default settings → Save



3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.



4. **Validation Rules**

   Validation rules were added to maintain data accuracy and enforce business constraints.

   HandsMen Order Object

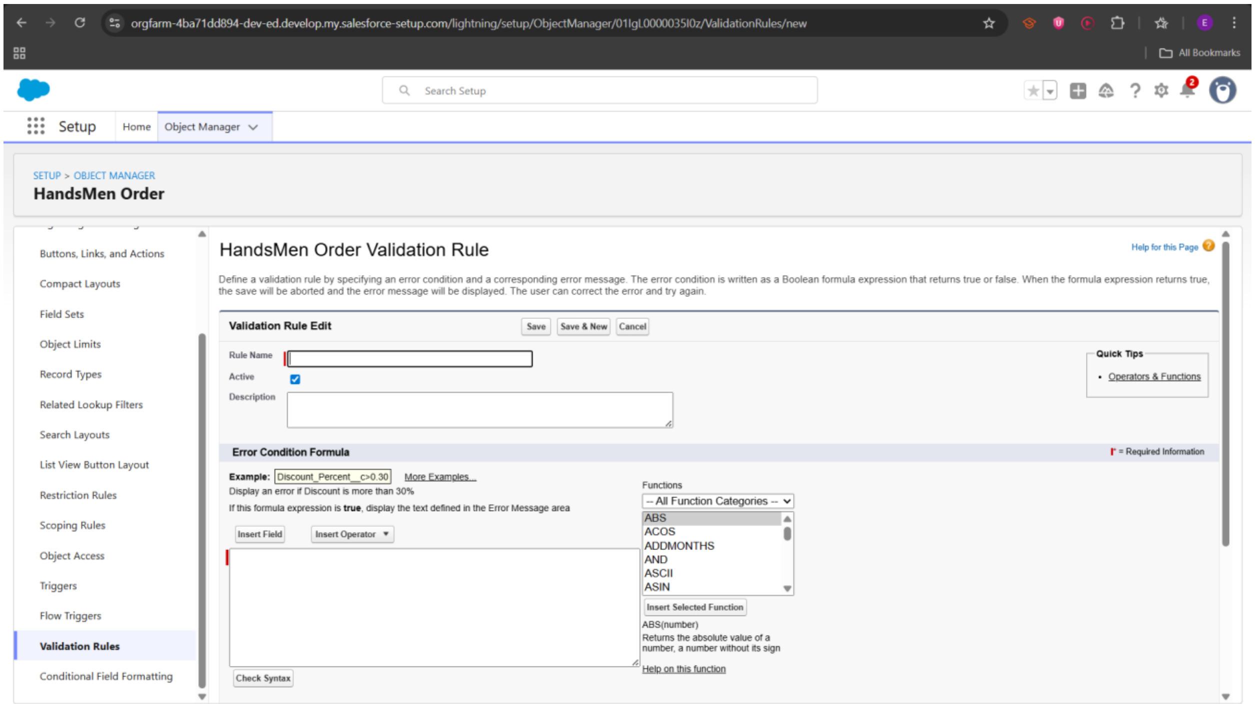
   - **Rule:** Prevent saving if Total_Amount__c <= 0
   - **Error Message:** *“Please Enter Correct Amount”*

   HandsMen Customer Object

   - **Rule:** Email must contain "@gmail.com"
   - **Error Message:** *“Please fill Correct Gmail”*

   Inventory Object

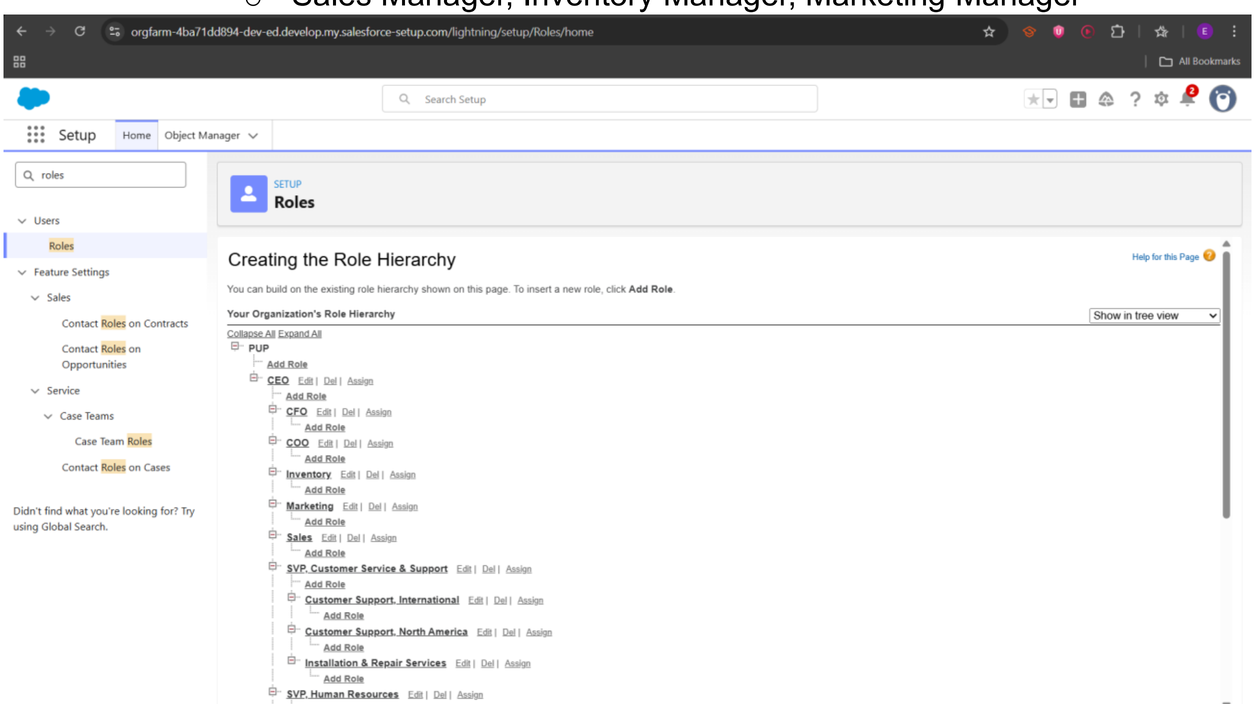
   - **Rule:** Stock_Quantity__c must be greater than 0



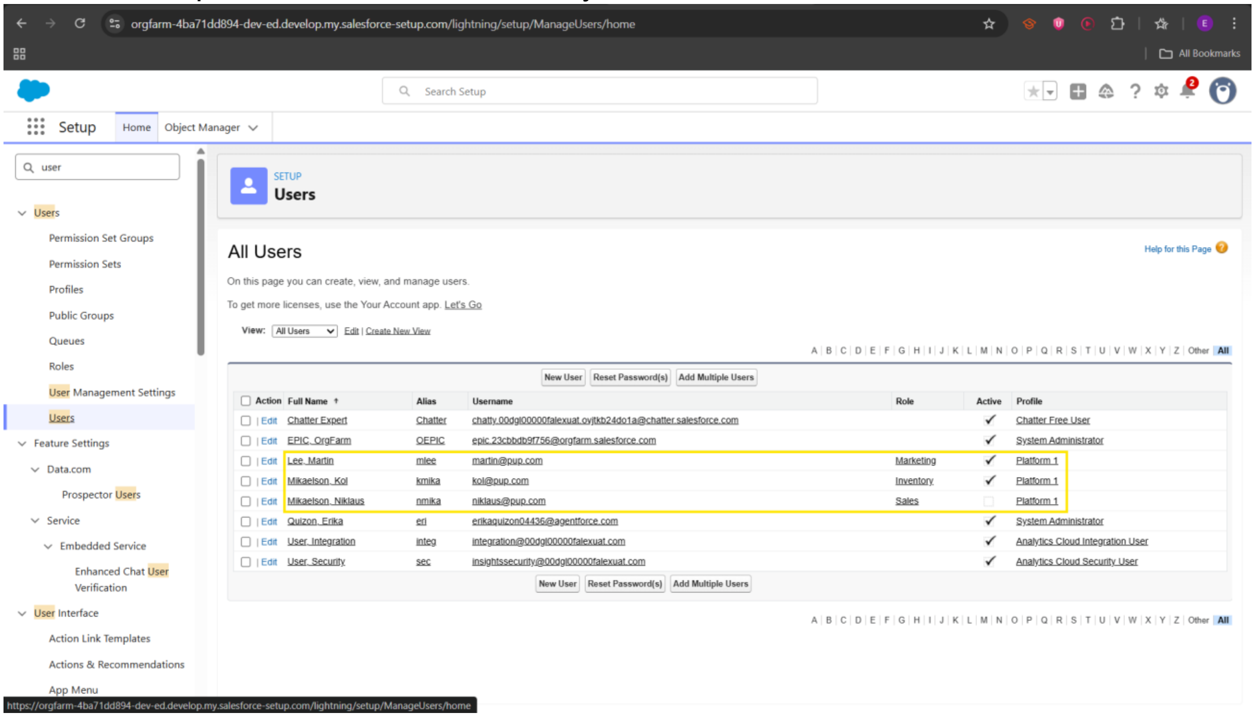
5. User Role & Profile Setup

Roles and profiles were configured to manage system-level permissions:

- Created a custom profile Platform 1 based on Standard User
- Created the following roles reporting to CEO:
  - Sales Manager, Inventory Manager, Marketing Manager

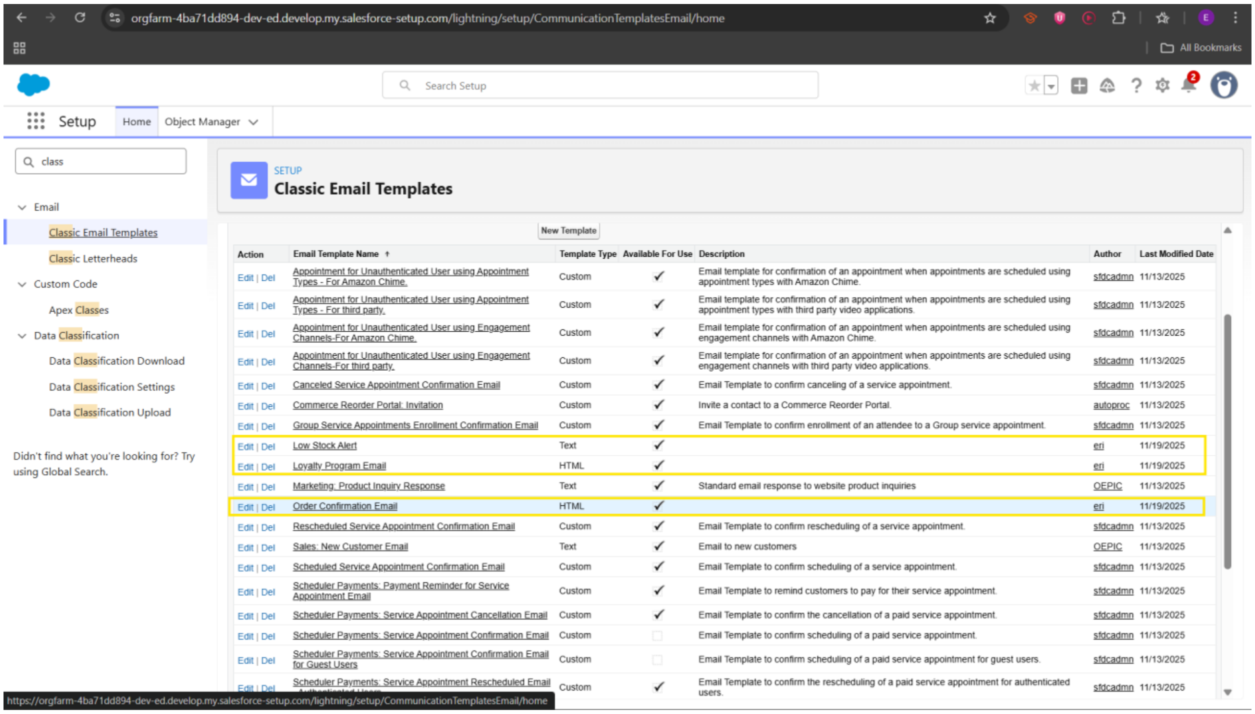


6. **User Creation**
Users were creating in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:
- Niklaus Mikaelson - Sales Role + Platform 1 Profile
- Kol Mikaelson - Inventory Role + Platform 1 Profile
- Martin Lee - Marketing Role + Platform 1 Profile
- These role-based assignments help enforce proper data access and process control within the system



7. **Email Template & Alerts**
Created three email templates:
- Order Confirmation - Sent on order status = Confirmed
- Low Stock Alert - Sent when Inventory < 5 units
- Loyalty Program Email - Sent when loyalty status changes

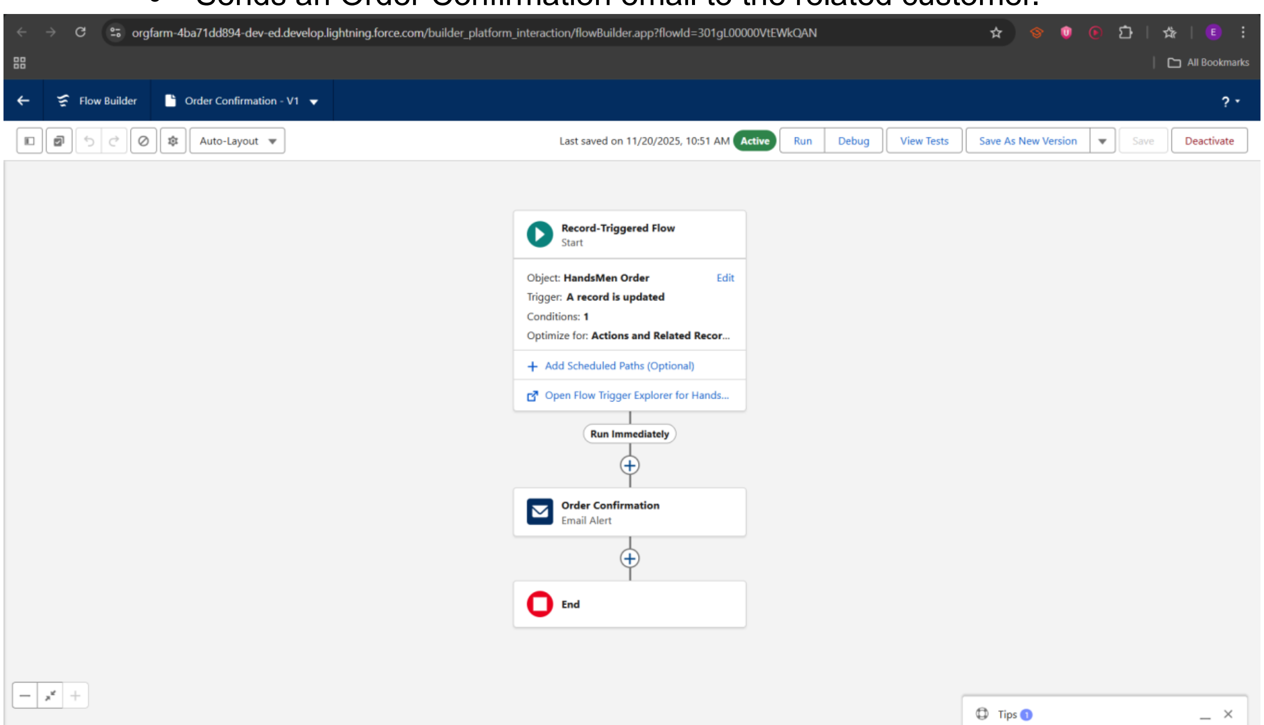
Email Alerts were configured and linked to automation flows.



8. Flow Implementation

a. Order Confirmation Flow

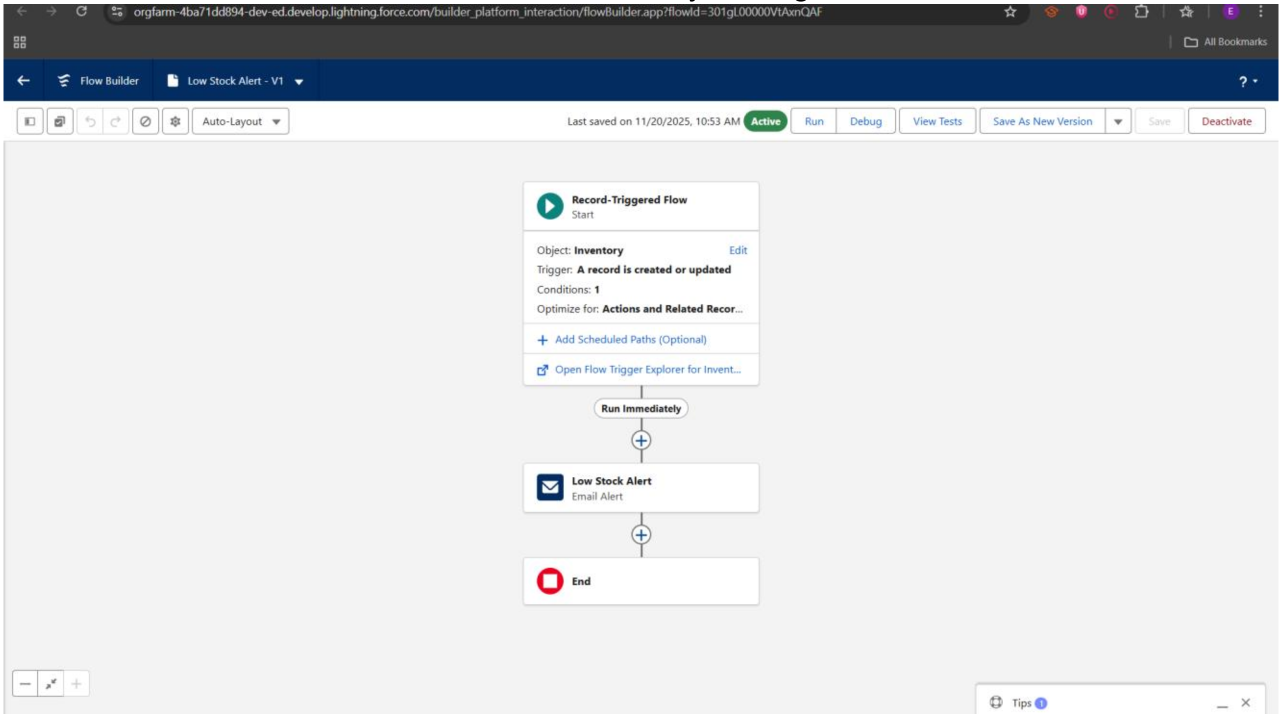
- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



b. Low Stock Alert Flow

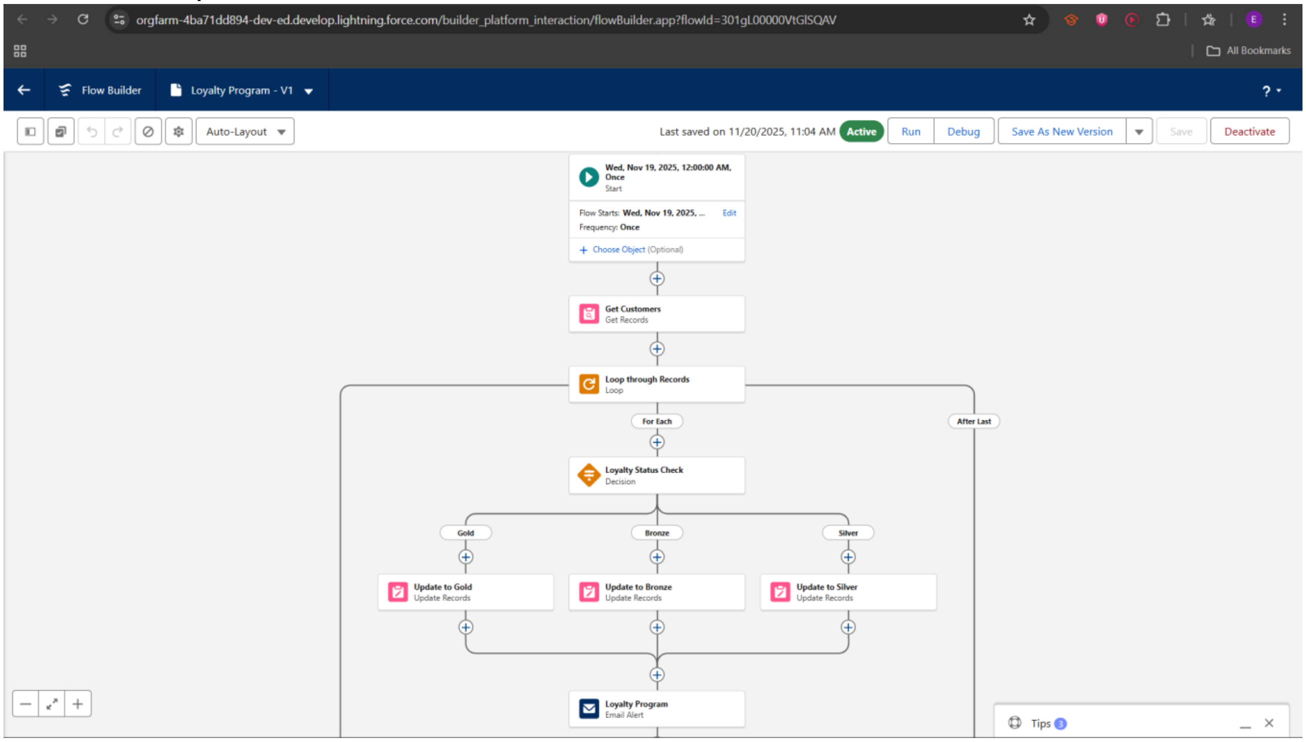
- Triggered when Inventory stock drops below 5.

- Sends Low Stock email to Inventory Manager.

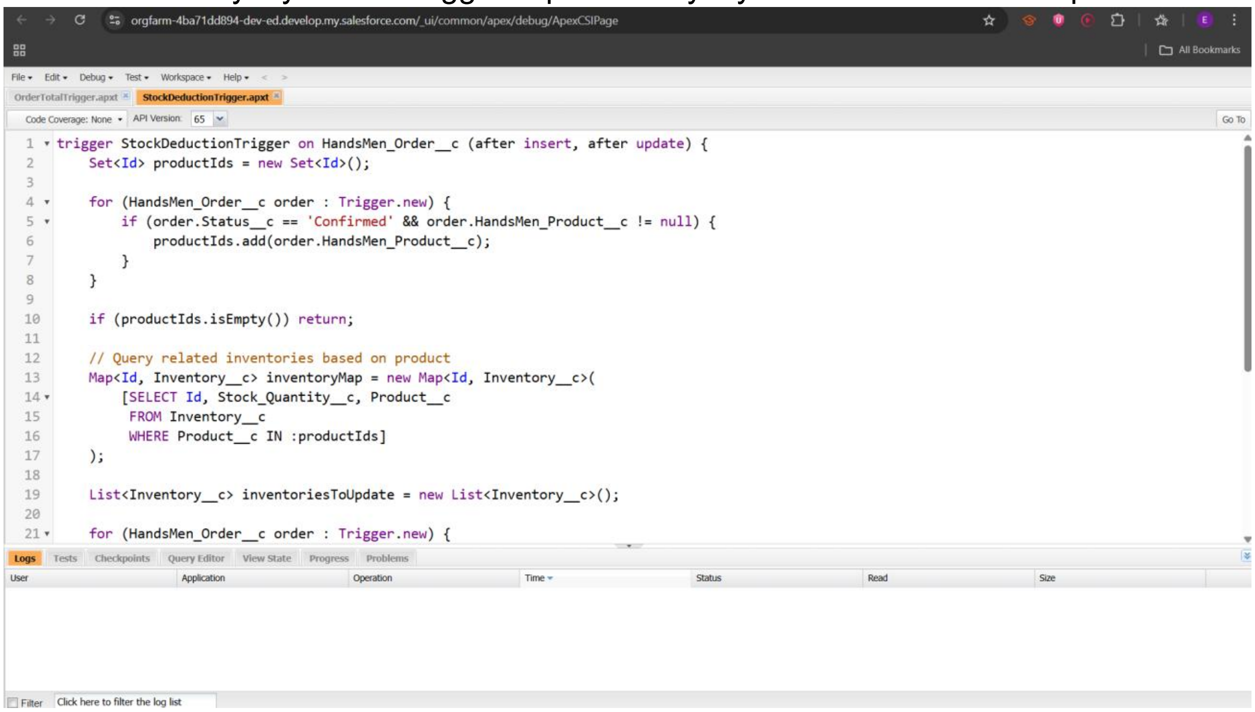


c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



9. **Apex Triggers**
    - Order Total Trigger: Auto-calculates Total Amount based on quantity and unit price.
    - Stock Deduction Trigger: Reduces stock when an order is placed.
    - Loyalty Status Trigger: Updates Loyalty Status based on total purchases.



PROJECT DEMONSTRATION FLOW

Project Demonstration Video Link:
https://drive.google.com/file/d/16sAfESkglFLI5NEx-xr1bnJ8GKlULuFi/view?usp=sharing

1. **Customer Registration**

   A customer, **Lily Lee**, visits the HandsMen Threads store or website. In Salesforce, we create a new record in the **HandsMen Customers** object, entering her name, phone number, and email.

   A **Validation Rule** ensures Lily's email follows the correct format. For example, if we forget to add **".com"**, Salesforce displays an error message. After correcting it, a **toast message** confirms the customer record has been successfully created.

2. **Product Setup**

   Next, we add a new product to the HandsMen Products object.
   For example:
    - Product Name: Necktie
    - SKU: 002

- Price: 150
- Stock Quantity: 300 pieces

3. **Inventory Setup**
   To manage product stock, we record this product inside the Inventory object.
   Since the Inventory object has a lookup relationship with HandsMen Products, we simply select the product Necktie and enter:
   - Available Stock: 300
   - Warehouse Location: Aisle 1, Column 2

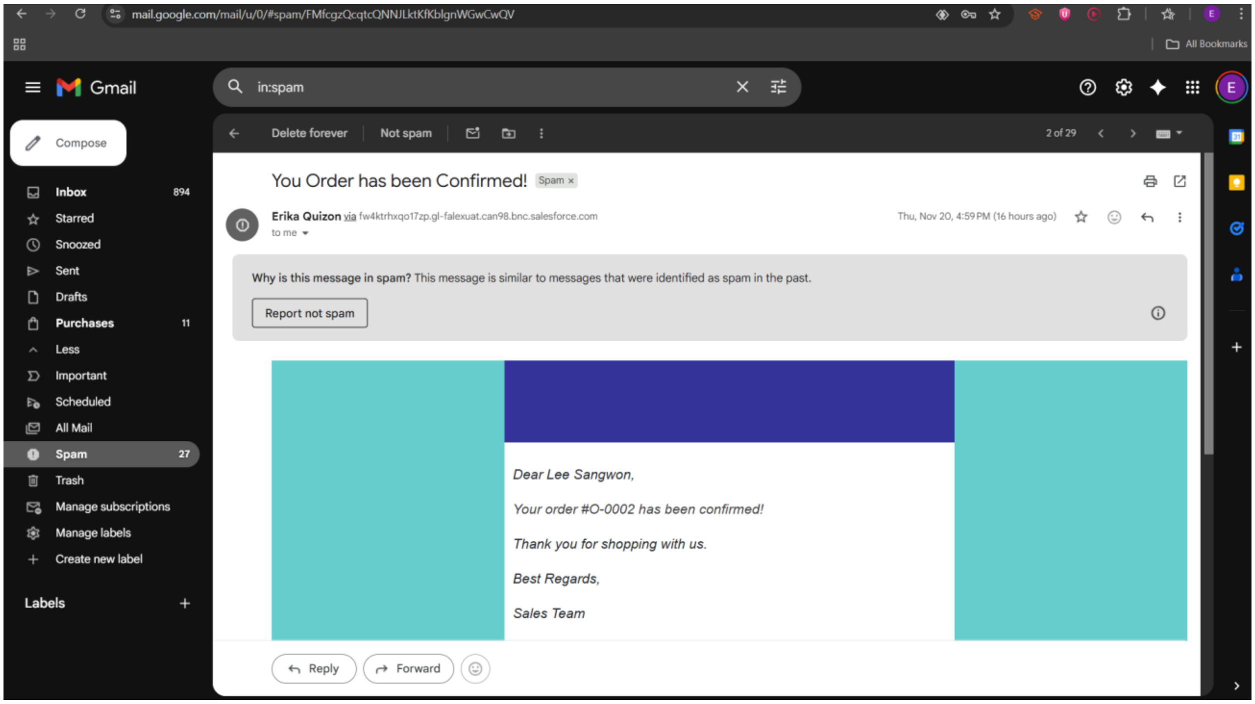
   Saving the record successfully adds it to the inventory.

4. **Order Placement**
   Now, let's place an order in the HandsMen Orders object.
   Customer Lee Sangwon wants to buy 5 Neckties.
   We fill out:
   - Status: Pending
   - Product: Necktie
   - Quantity: 5
   - Customer Email: erikaquizon04@gmail.com

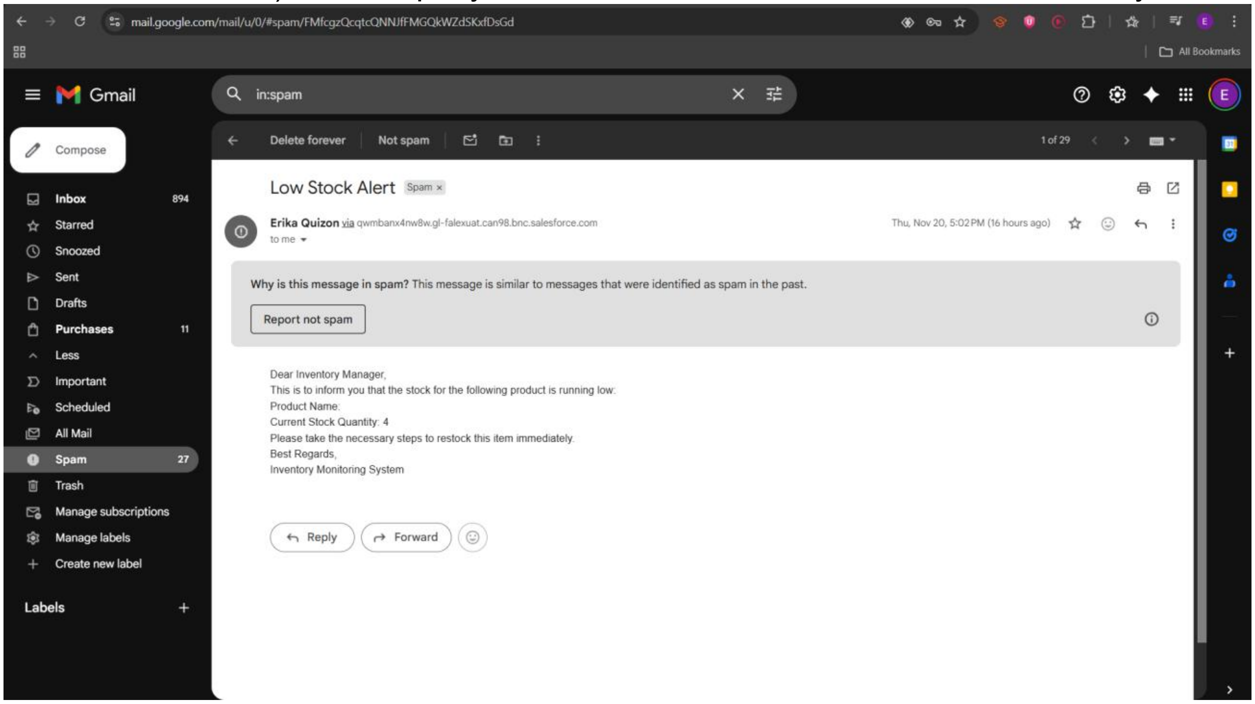
   The Total Amount automatically updates based on the quantity and price, thanks to an Apex Trigger.
   Saving the order shows another toast message confirming its creation.

5. **Inventory Update (Apex Trigger)**
   Behind the scenes, the StockDeductionTrigger automatically updates inventory.
   When the order status is changed from Pending → Confirmed, the trigger deducts the purchased quantity from the stock.
   Example:
   - If Sangwon buys 5 Neckties from the original 300, the inventory updates to 295.
   - A Validation Rule also ensures that stock can never go below zero.Loyalty Program

6. **Email Notification**
   HandsMen Threads uses a Flow to send email notifications during key events:
   - Order Confirmation Email: When the order status becomes Confirmed, an automated email is sent:



- Low Stock Alert: If stock falls below a threshold (e.g., we manually change it to 2), the company receives a Low Stock Alert email automatically.



- Loyalty Program Email: A scheduled trigger runs daily (12 AM) to check customer total purchases:
  - Below 500 → Bronze
  - 500 – 1000 → Silver
  - Above 1000 → Gold

For example, if Lily's total purchase is updated to 1200, her loyalty status becomes Gold, and she will receive an email—though this will only be triggered at midnight due to the schedule.

CONCLUSION

By integrating custom objects, validation rules, email alerts, flows, and Apex triggers, we successfully built an optimized business process for HandsMen Threads. This ensures smooth customer registration, product management, inventory tracking, automated notifications, and loyalty reward updates.

DEFINITION OF TERMS

Salesforce. A cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programming capabilities (like Apex and Flows) to build custom business solutions.

Customer Objects. Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Tabs. Tabs are used to display object data in the Salesforce UI.

Custom App. An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles. Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles. Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets. Permission Sets grant additional permissions to users without changing their profile.

Validation Rules. Validation rules ensure data entered meets business criteria.

Email Templates. Predefined formats for sending emails to customers or users

Email Alerts. Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Flows. Flows automate business logic without code. The can create, update, or send notifications.

Apex. Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.