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

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Table of Contents

PROJECT 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:

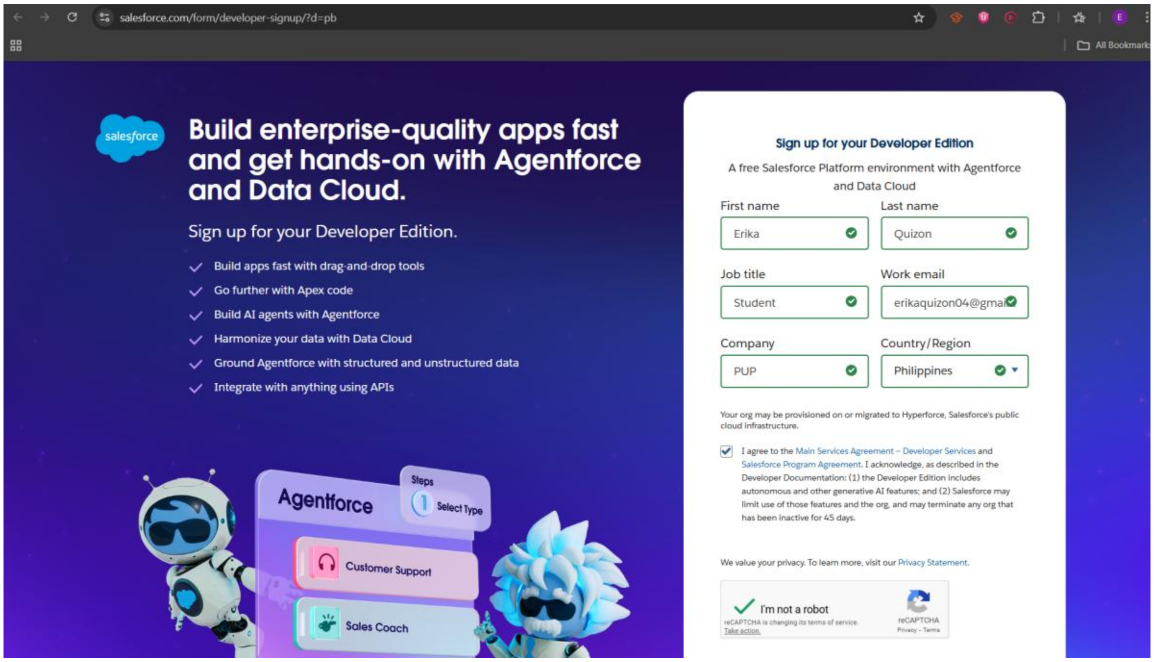
1. Build a scalable Salesforce data model for customers, orders, inventory, and campaigns;
2. Ensure accurate data entry through validation rules and proper field configuration;
3. Implement automation using Flows, Email Alerts, and Apex triggers;
4. Develop Apex logic for calculations, stock management, and loyalty updates;
5. Create a secure system using profiles, roles, and permission settings;
6. Improve customer communication through automated email notifications.

PHASE 1: REQUIREMENT ANALYSIS & PLANNING

1. **Understanding Business Requirements**
    - HandsMen Threads needed a CRM solution to address:
        - Errors in order computation
        - Untracked inventory or stock quantity
        - Lack of automated customer notification
        - Improved loyalty program
2. **Project Scope**
    - Custom Objects namely Customer, Order, Product, Inventory, and Campaign
    - Apex Triggers for process automation
    - Scheduled flow for loyalty updates
    - Email Alerts
    - Validation rules
    - Role-based access security
3. **Data Model Design**
    - Objects Created:
        - HandsMen Customer
        - HandsMen Product
        - HandsMen Order
        - Inventory
        - Marketing Campaign
    - Relationships
        - Product - Inventory (Master-Detail)
        - Customer - Orders (Lookup)
        - Marketing - Customer (Lookup)
        - Order - Product (Lookup)
4. **Security Model**
    - Profile: Platform 1
    - Roles: under CEO
        - Sales Manager
        - Inventory Manager
        - Marketing Manager

PHASE 2: SALESFORCE DEVELOPMENT - BACKEND & CONFIGURATION

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



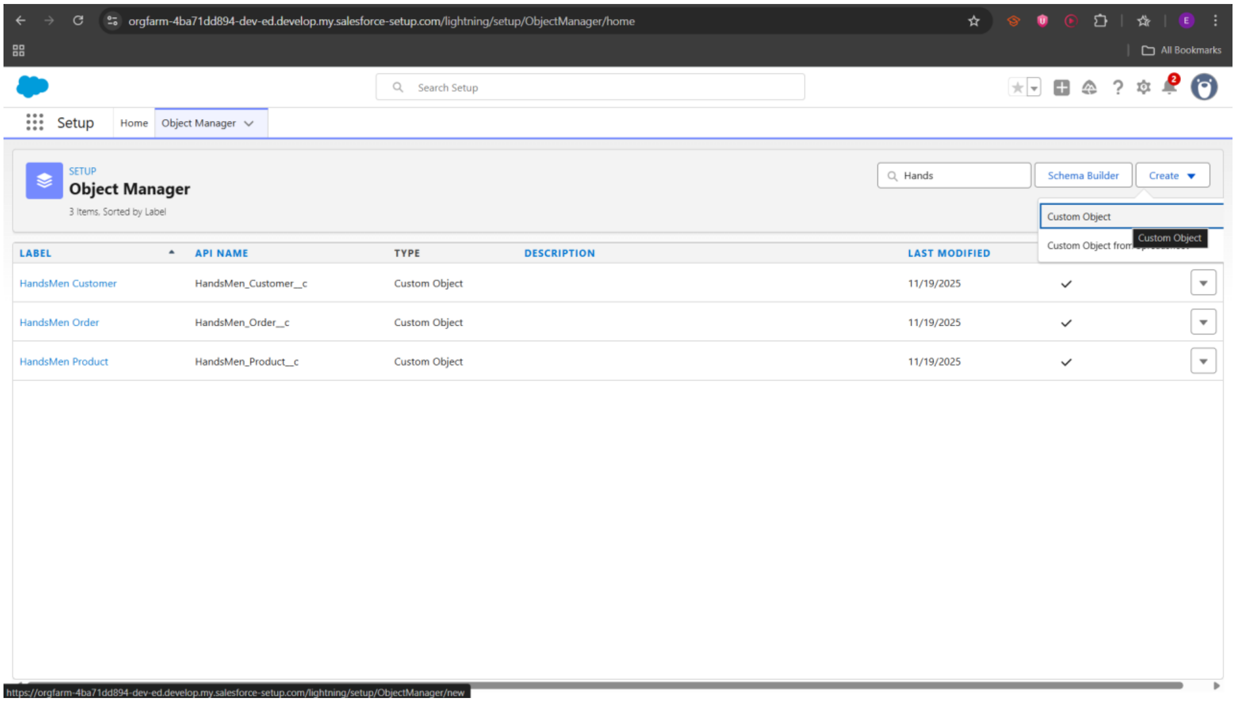
2. **Custom Object Creation**

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.

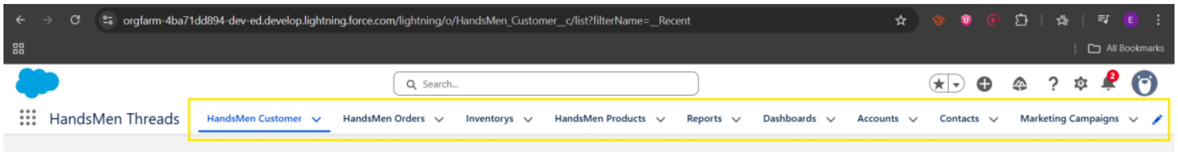
Steps to Create Custom Object:

- 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. **Validation Rules**
Validation rules were added to maintain data accuracy and enforce business constraints.
HandsMen Order Object

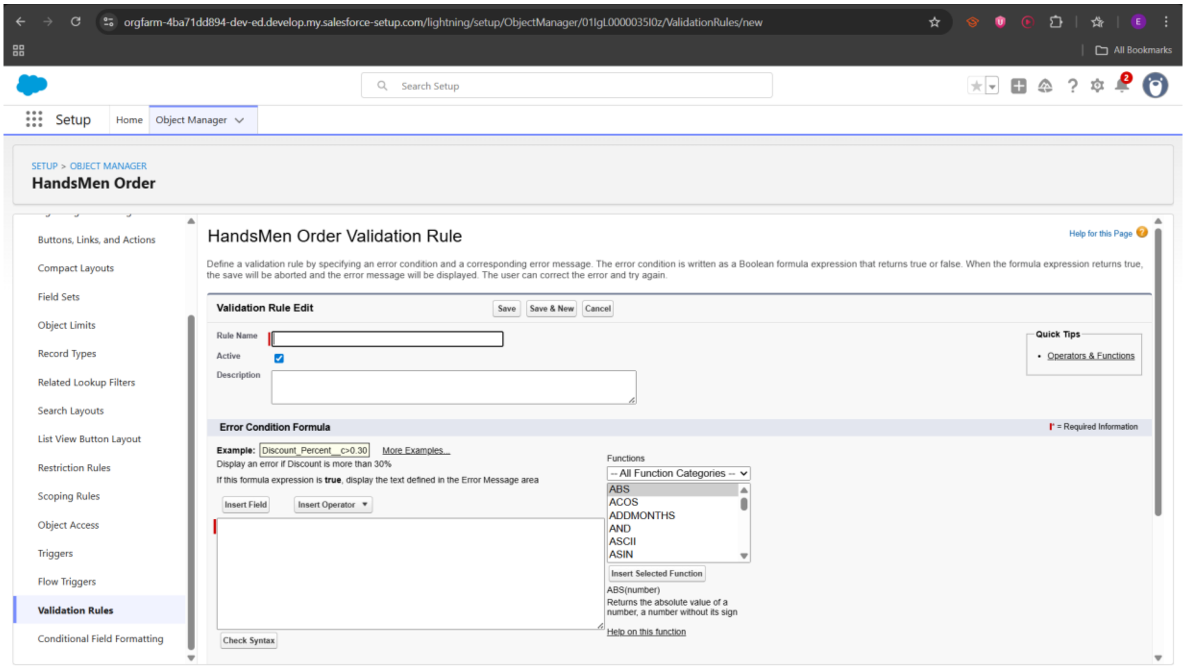
- **Rule:** Prevent saving if Total_Amount__c <= 0
- **Error Message:** *"Please Enter Correct Amount"*

HandsMen Customer Object

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

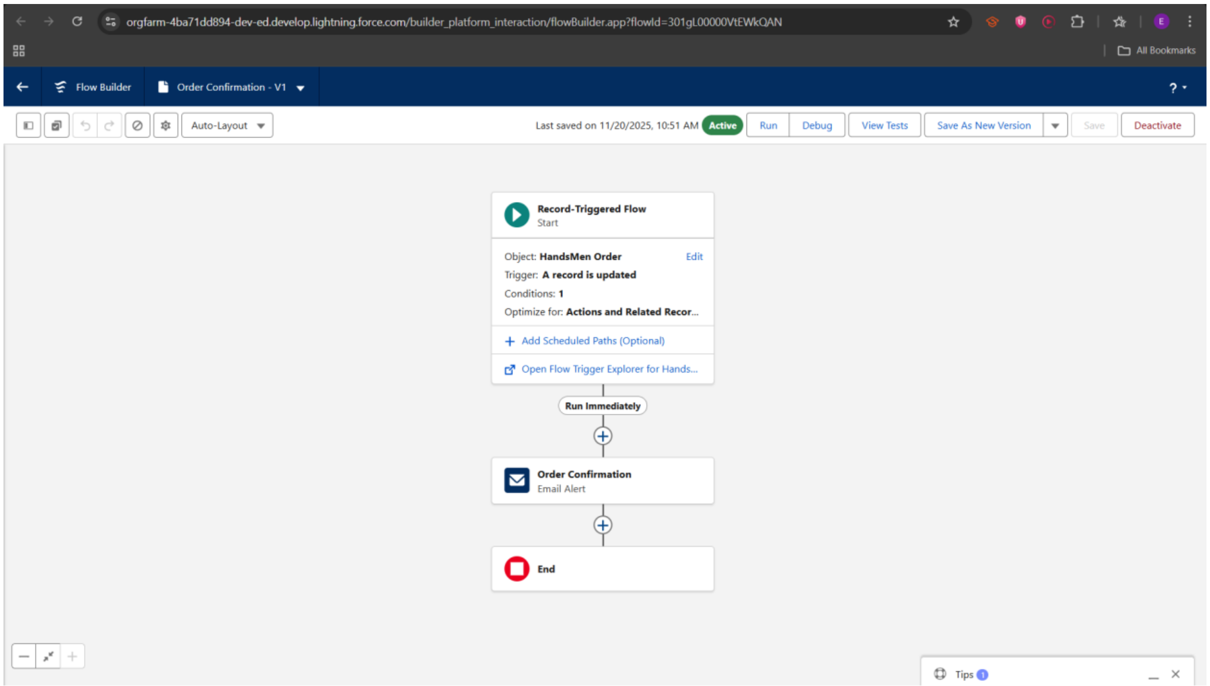
Inventory Object

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

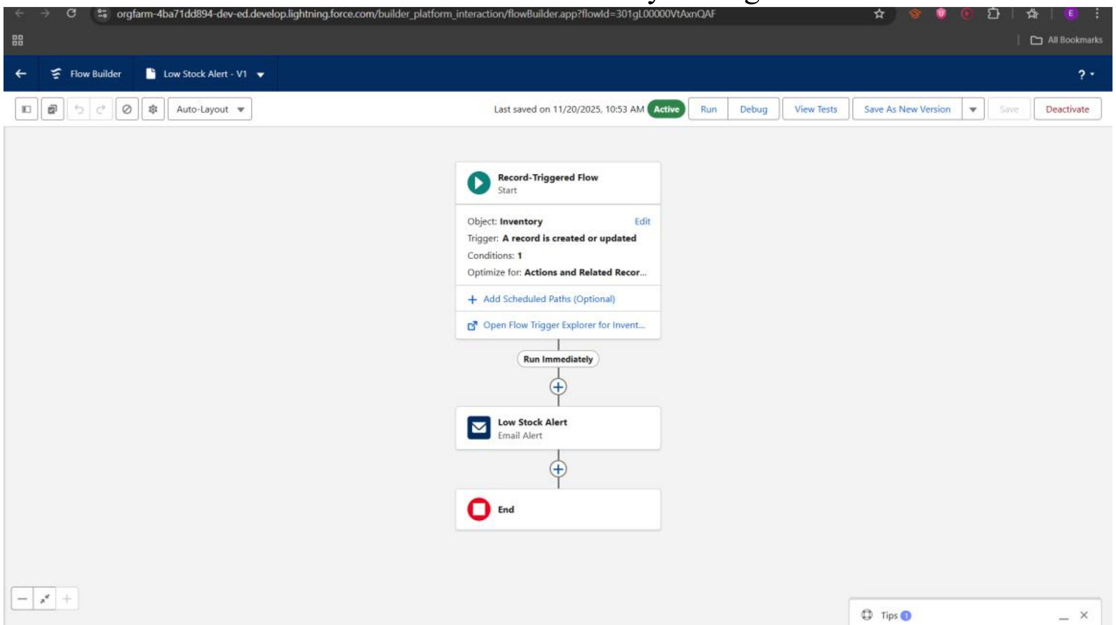


4. Flow Implementation

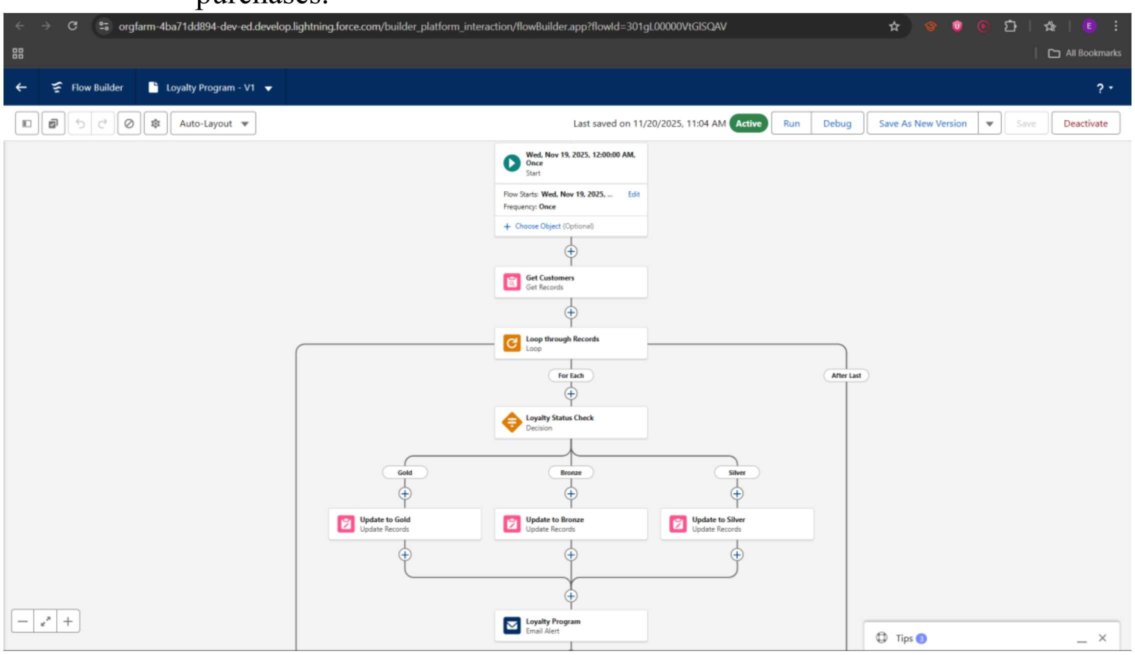
1. Order Confirmation Flow
    - Triggered when an order is updated to Confirmed.
    - Sends an Order Confirmation email to the related customer.



2. Low Stock Alert Flow
    - Triggered when Inventory stock drops below 5.
    - Sends Low Stock email to Inventory Manager.

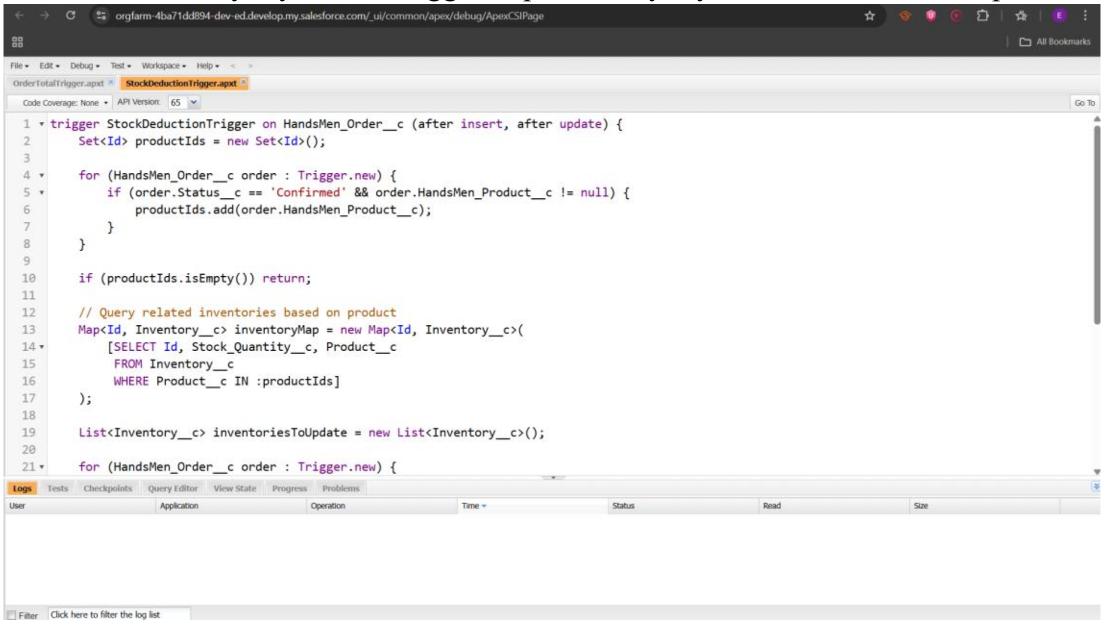


3. Scheduled Flow: Loyalty Update
    - Runs daily at midnight.
    - Loops through customers and updates their Loyalty Status based on total purchases.



5. **Apex Triggers**
    a. Order Total Trigger: Auto-calculates Total Amount based on quantity and unit price.

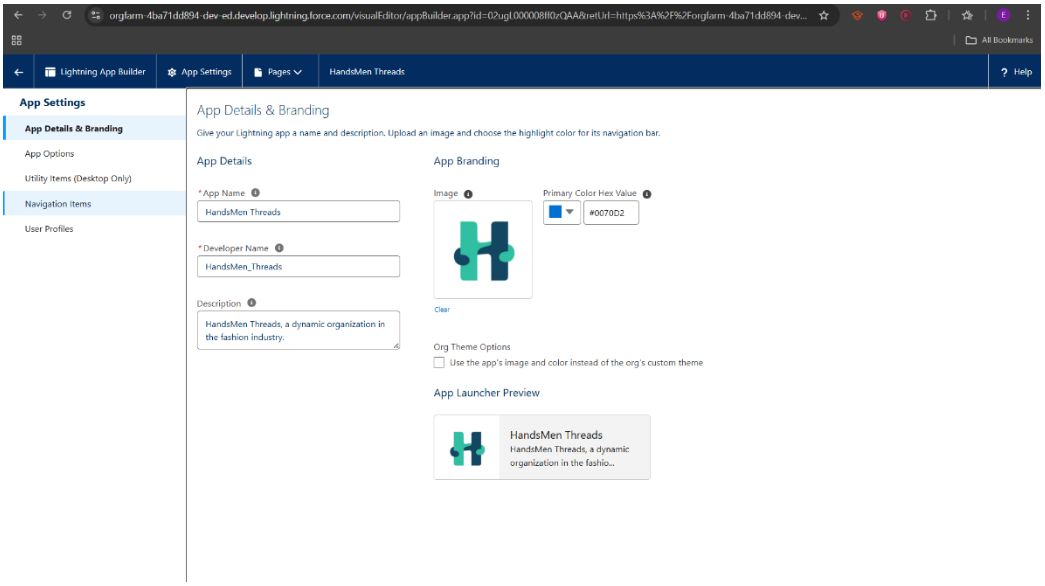
b. Stock Deduction Trigger: Reduces stock when an order is placed.
c. Loyalty Status Trigger: Updates Loyalty Status based on total purchases.



PHASE 3: UI/UX DEVELOPMEMT & CUSTOMIZATION

1. Creating the Lightning App

a. A custom Lightning App named HandsMen Threads was created.
b. Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.

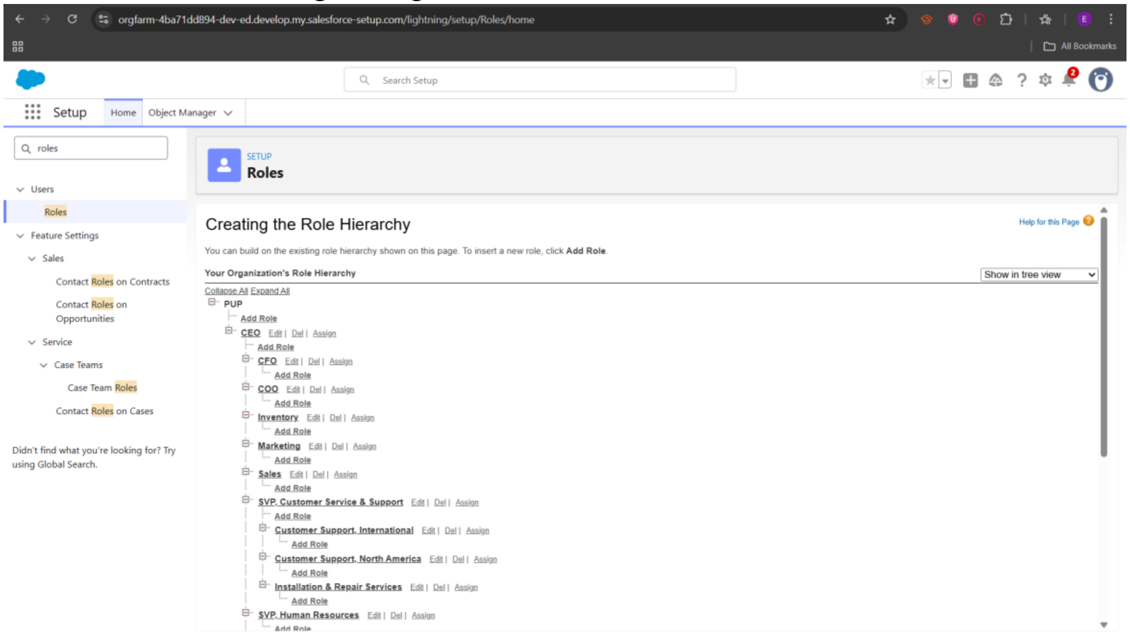


2. User Role & Profile Setup

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

- Created a custom profile Platform 1 based on Standard User

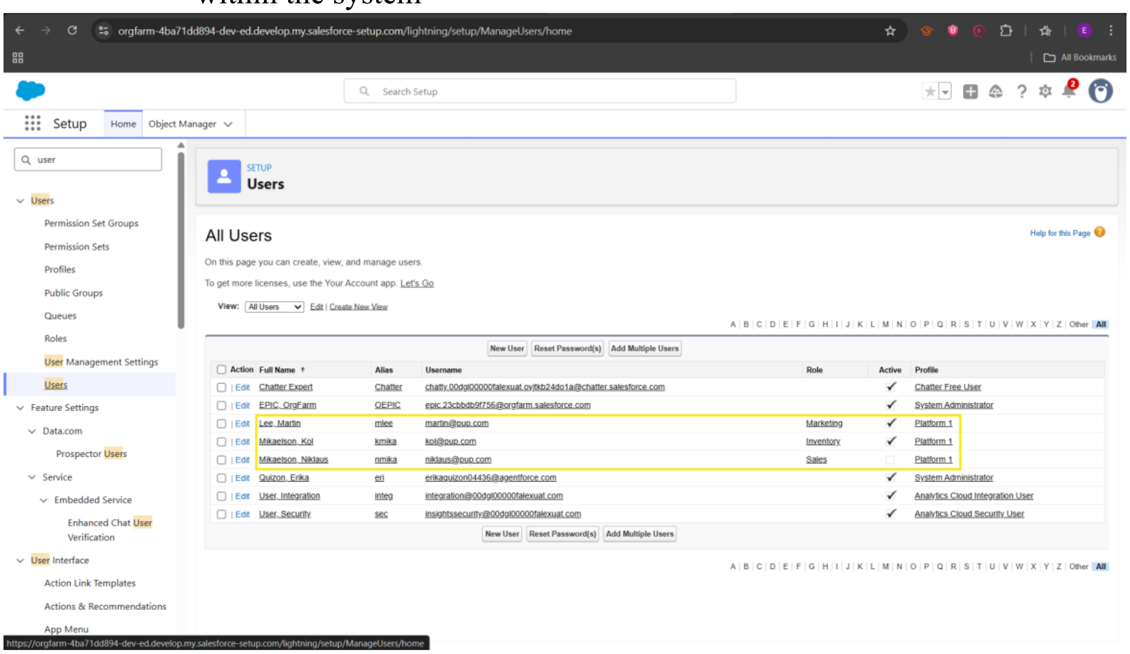
- Created the following roles reporting to CEO: Sales Manager, Inventory Manager, Marketing Manager



3. 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

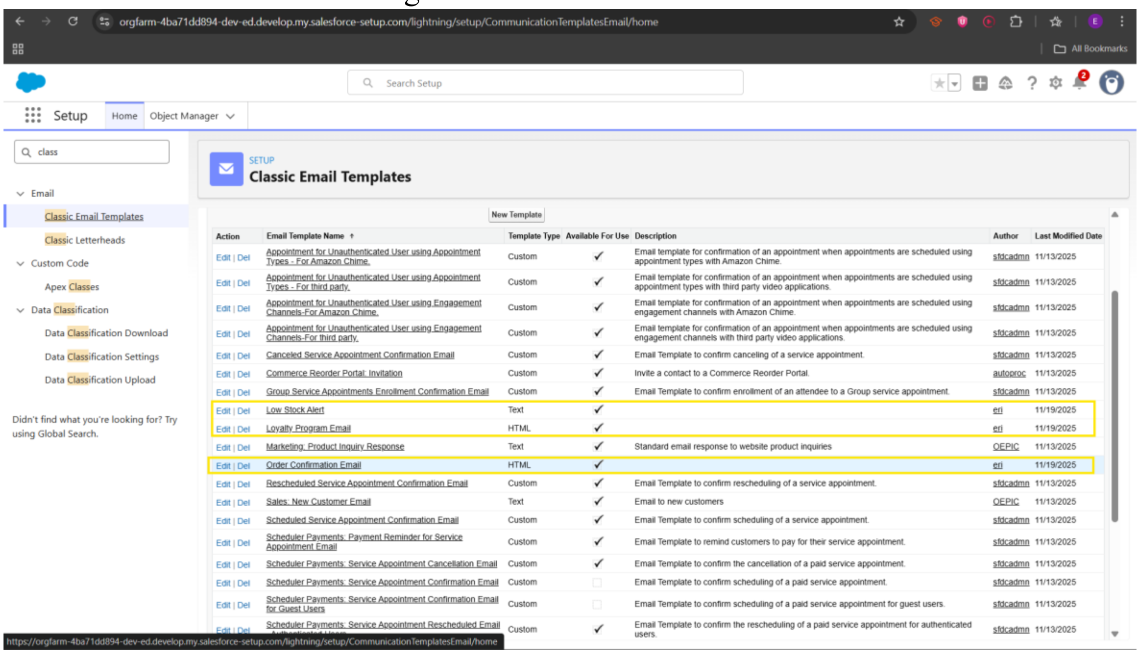


4. **Email Template & Alerts**

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.



PHASE 4: DATA MIGRATION, TESTING & SECURITY

1. **Security Configuration**
   - Platform 1 (Custom Profile) – baseline permissions for Sales, Inventory, and Marketing users
   - Validation rule for email format, quantity
2. **Integrated Testing Using Project Demonstration Flow**

Project Demonstration Video Link: https://drive.google.com/file/d/16sAfESkglFLl5NEx-xr1bnJ8GKlULuFi/view?usp=sharing

- **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.

- **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

- **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

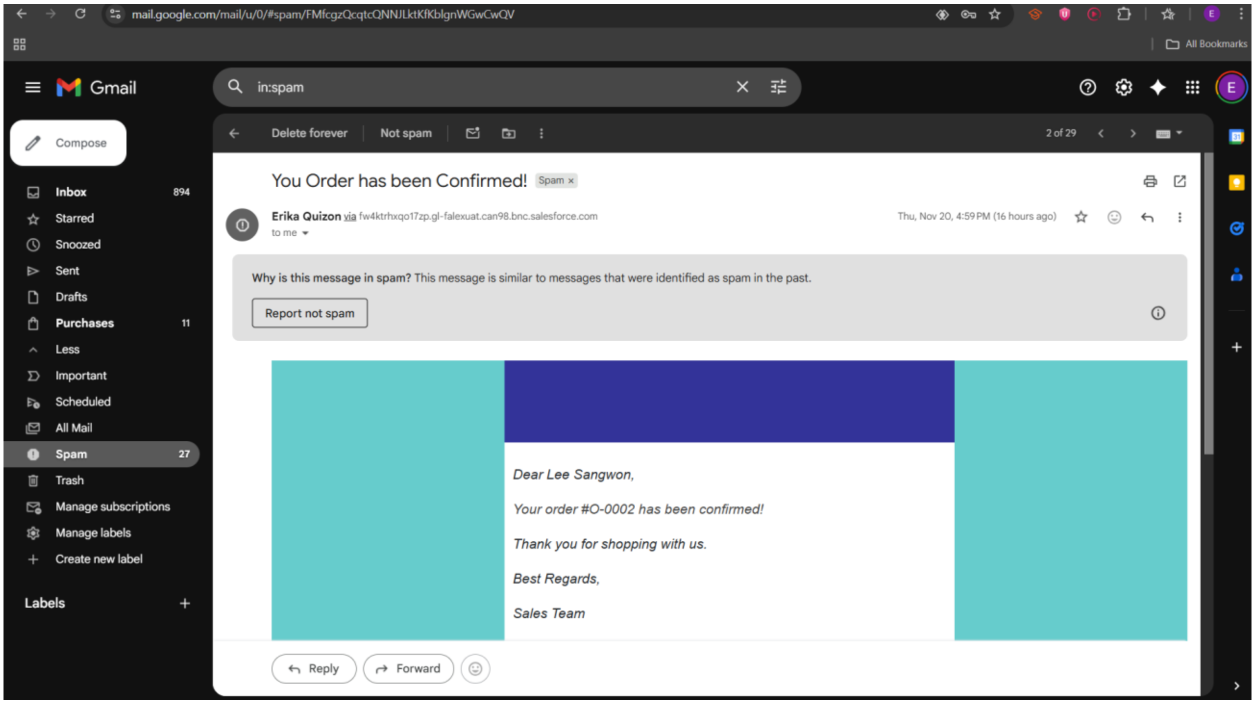
  Saving the record successfully adds it to the inventory.

- **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

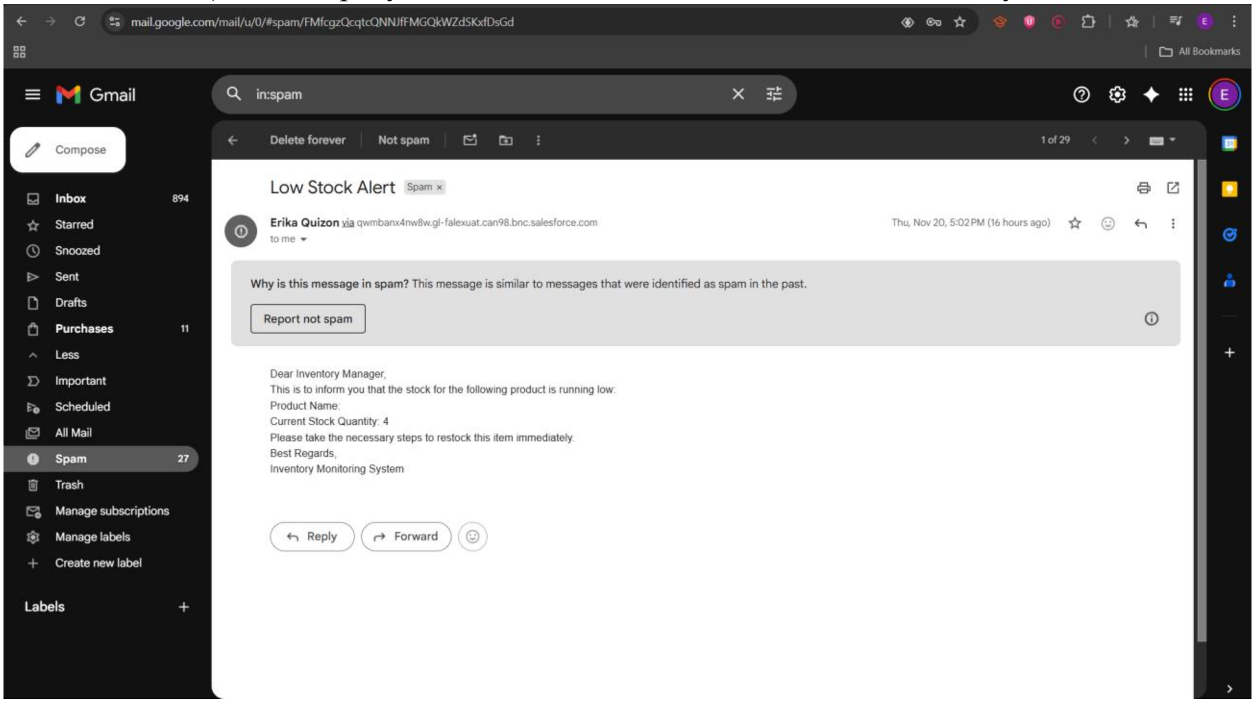
  The Total Amount automatically updates based on the quantity and price, thanks to an Apex Trigger.
  Saving the order shows another toast message confirming its creation.

- **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

- **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.

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

To ensure long-term stability, and quality performance of the HandsMen Threads Salesforce Platform, a structured maintenance and monitoring plan will be implemented. This includes routine system checks, data quality reviews, user support, and periodic updates based on evolving business needs.

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.

Throughout the project, each development phase, from requirement analysis to deployment, ensured that the system aligned with business needs. The CRM now provides the Sales, Inventory, and Marketing teams with a centralized platform that enhances productivity.

Overall, this project demonstrates how Salesforce can be tailored to support retail operations and highlights the potential for future enhancements, such as advanced analytics, chatbot integrations, and AI-based recommendations. The HandsMen Threads CRM stands as a sustainable, user-friendly, and future-ready solution for the organization's continued growth.

DEFINITION OF TERMS

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

Apex. Salesforce's object-oriented programming language used to implement advanced business logic, automation, and backend processes when point-and-click tools are not sufficient.

Custom App. A collection of tabs in Salesforce grouped together to support a specific business function. Custom Apps define the user interface and navigation experience.

Custom Objects. User-created database tables in Salesforce that store specialized business data not covered by standard Salesforce objects.

Email Alerts. Automated emails sent from Salesforce based on specific triggers such as record changes, approval steps, or flow executions.

Email Templates. Pre-designed email formats used for sending consistent and standardized messages to customers or internal users.

Flows. A Salesforce automation tool that allows the creation of complex business processes without code. Flows can create records, update fields, send notifications, and run logic automatically.

Permission Sets. Additional permission configurations assigned to users to extend access without modifying their profile.

Profiles. Settings that define what a user can access, view, edit, or delete within Salesforce. Profiles control object permissions, field-level security, and system access.

Roles. Part of Salesforce's role hierarchy that determines record visibility and sharing. Roles help define who can view or manage data owned by other users.

Salesforce. A cloud-based Customer Relationship Management (CRM) platform used to manage customer data, automate business processes, improve marketing, sales, and service operations, and build custom applications.

Tabs. Navigation components in Salesforce that allow users to access objects, applications, functionalities, and custom pages from the interface.

Validation Rules. Logic rules that enforce data quality by preventing invalid or incorrectly formatted information from being saved to Salesforce records.