HandsMen Threads: Redefining Men's Fashion Operations through Salesforce

Project Documentation for the Salesforce Developer

Virtual Internship Program Capstone

Hazel Ann Mones

Asia Pacific College

2025

1. Overview

This project documentation presents the development of a customized Salesforce Customer Relationship Management (CRM) system designed specifically for HandsMen Threads, an emerging leader in men's fashion. The initiative was undertaken to address the growing complexities associated with customer relationship management, order processing, inventory monitoring, and targeted marketing campaigns as the company scaled.

The new system harnesses the Salesforce platform to automate repetitive yet essential tasks, enforce data integrity, and provide the organization with real-time operational insights. By integrating a suite of Salesforce tools—including custom objects, intuitive automation flows, validation frameworks, reusable email templates, and Apex-driven logic—HandsMen Threads now benefits from a solution that not only strengthens customer engagement but also reduces inefficiencies in sales and inventory management.

In practice, this means that common operational hurdles, such as stock mismanagement, inconsistent customer communication, and fragmented data, have been replaced with an intelligent, centralized ecosystem. The CRM empowers team members with immediate visibility of customer activity, ensures accurate stock tracking, and supports marketing efforts with measurable campaign outcomes. Ultimately, this solution lays the foundation for greater scalability, better decision-making, and enhanced customer loyalty in a competitive retail market.

2. Objectives

The overarching objective of this project was to design and implement a Salesforce-based CRM solution that could streamline core business operations while simultaneously enhancing the customer experience. The aim was not only to modernize how HandsMen Threads managed its day-to-day processes but also to establish a future-ready system capable of supporting business expansion.

To achieve this goal, the following specific objectives were outlined:

1. **Automation of Key Processes**

   Replacing manual work with automated workflows to handle activities such as sending order confirmations, adjusting loyalty program levels, and generating stock alerts.

2. **Improving Data Accuracy**

   Implementing robust validation rules to standardize data entry, prevent errors, and ensure consistency across records—ultimately leading to more reliable reporting and decision-making.

3. **Enhancing Visibility and Transparency**

   Providing employees with real-time dashboards and reports to view inventory levels, track customer interactions, and monitor sales performance. This transparency supports faster responses and more accurate planning.

4. **Facilitating Cross-Department Collaboration**

Encouraging seamless communication among sales, marketing, and inventory teams through centralized access to data, thereby reducing silos and inefficiencies.

5. **Delivering Personalized Customer Experiences**

   Leveraging Salesforce's automation and messaging tools to send timely, relevant communications and loyalty updates, ensuring that customers feel recognized and valued.

Together, these objectives formed the blueprint for a CRM solution capable of bridging operational efficiency with customer satisfaction—two pillars critical to HandsMen Threads' long-term growth.

3. Technology Description

3.1. Salesforce Platform

Salesforce was the foundation of the solution, serving as a centralized operational hub. It is a cloud-based CRM platform designed to unify customer, sales, service, and marketing activities. Its flexibility allowed HandsMen Threads to use low-code customization tools (like Flows, Lightning App Builder, and declarative configuration) alongside programmatic customization (such as Apex code and triggers) for processes requiring more advanced logic.

3.2. Custom Objects

Custom objects were created to represent the essential data structures unique to HandsMen Threads' operations. These objects serve as the backbone of the CRM:

- **HandsMen_Customer__c:** Stores all customer-related information, including personal details, contact data, and loyalty program status. This object serves as the foundation for tracking customer relationships and interactions.

- **HandsMen_Product__c:** Manages the catalog of products offered by HandsMen Threads, including product descriptions, pricing, and available stock quantities.

- **HandsMen_Order__c:** Records all customer purchases, linking each order to the relevant customer and product entries. It captures details such as order date, quantity, and total amount, ensuring an accurate sales history.

- **Marketing_Campaign__c:** Keeps a record of marketing efforts and promotional activities. This enables the business to track campaign effectiveness and evaluate their impact on sales and customer engagement.

- **Inventory__c:** Dedicated to monitoring stock availability across the business. It helps track product quantities in storage, manage replenishment schedules, and generate low-stock alerts. This ensures that products are consistently available and that inventory levels align with demand.

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 |
| Triggers |

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		
First Name	FirstName__c	Text(60)		
Full Name	Full_Name__c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	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)		

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 |
| Triggers |

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 Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(16, 2)		
SKU	SKU__c	Text(60)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

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 |
| Triggers |

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)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
Customer Email	Customer_Email__c	Email		
HandsMen OrderNumber	Name	Auto Number		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Number	Order_Number__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

3.3. Tabs and Custom App

Custom tabs were created as navigation shortcuts for each custom object, making it simple for team members to quickly access customer, product, and order records.

In addition, a custom Lightning App named "HandsMen Threads" was developed. This app functions as the command center for employees, consolidating all key components—Customers, Products, Orders, Inventory, Campaigns, and Reports—into one unified workspace.
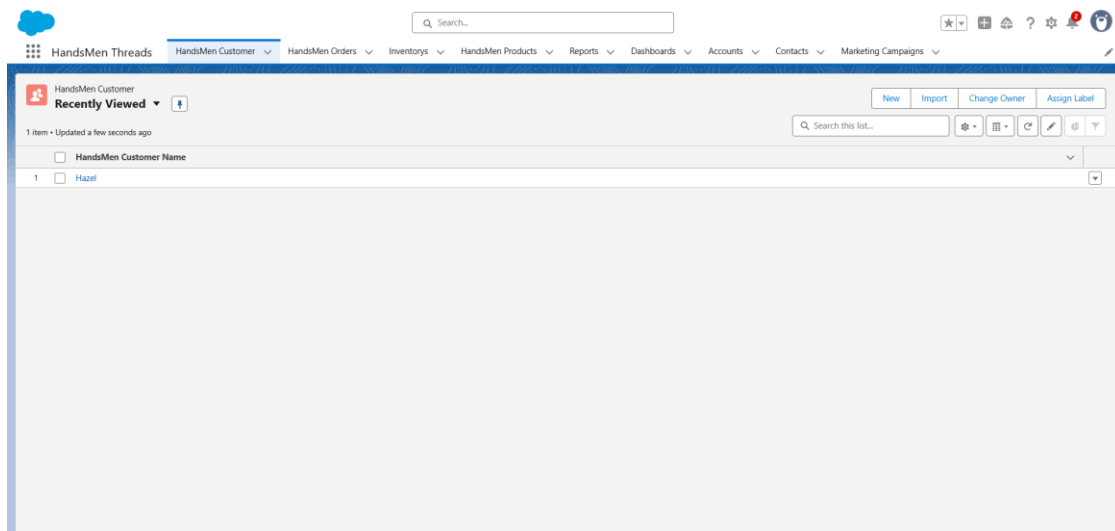

3.4. Profiles, Roles, and Users

Managing user access was critical for data security and operational clarity:

- **Profiles:** These define a user's basic permissions (e.g., what objects and fields they can see or edit). I cloned "Standard User" to create profiles like "HandsMen Sales Profile."
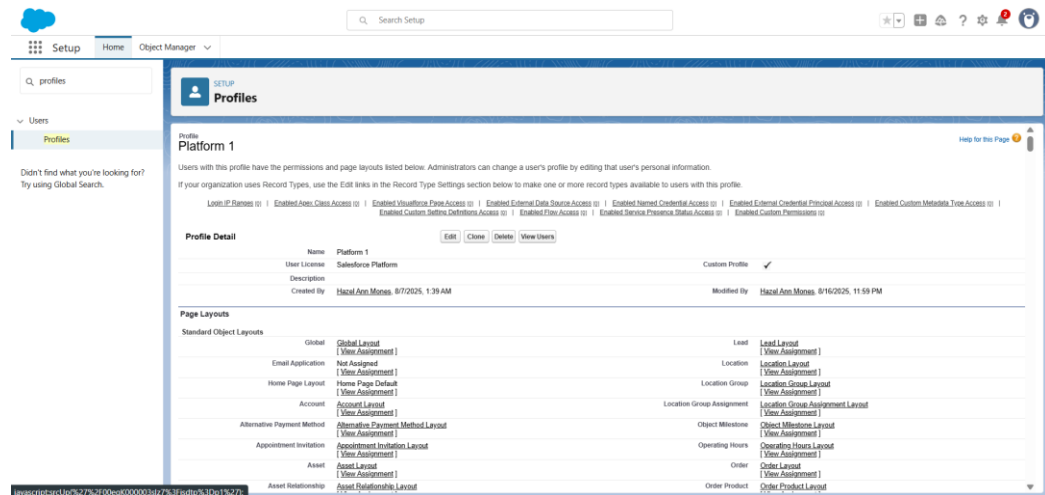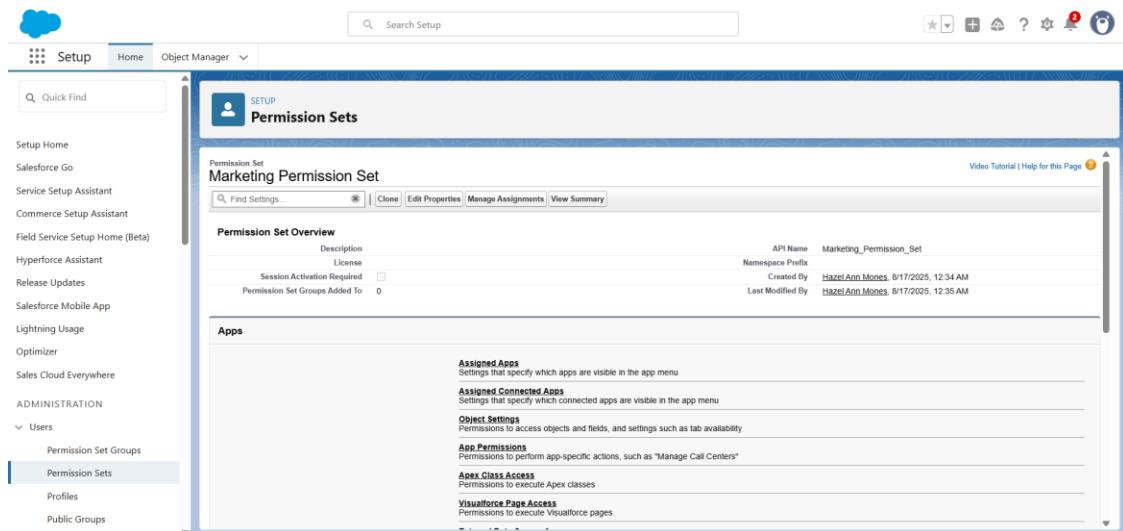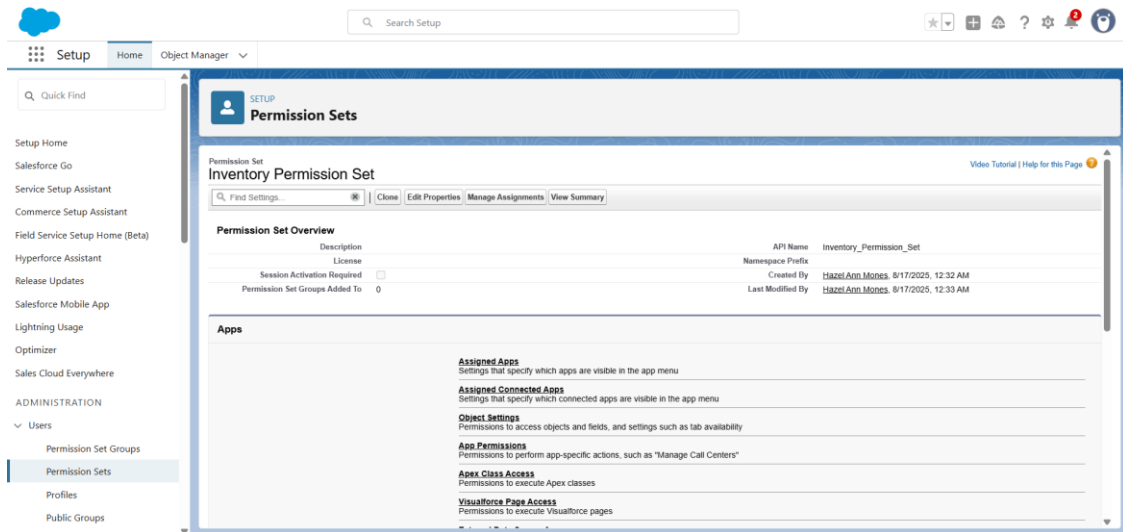
- **Roles:** These establish hierarchy-based data visibility. I created three roles that report under CEO which are Sales, Inventory, and Marketing.
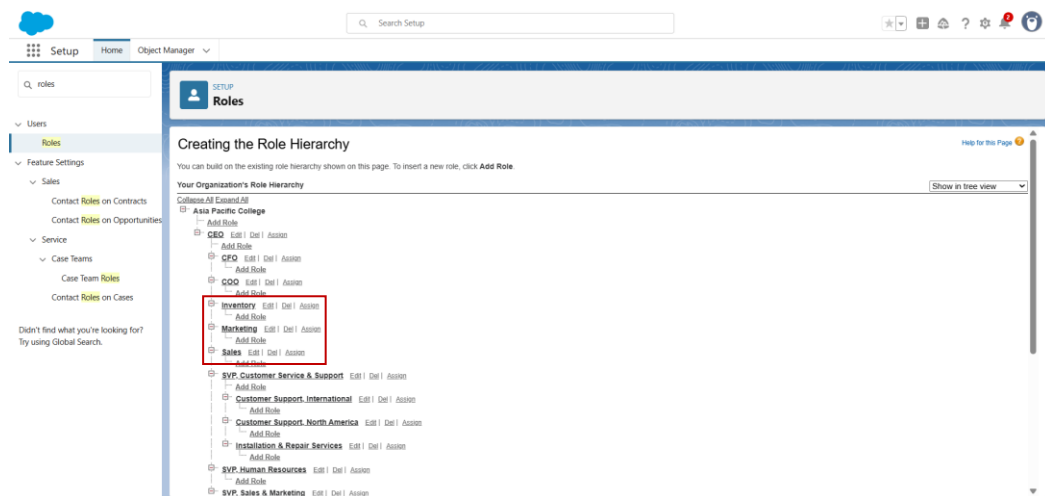
- **Users:** I demonstrated multi-user functionality by adding sample users like Niklaus Mikaelson (Sales), Kol Mikaelson (Inventory), and Daniel Mikaelson (Marketing).

3.5. Permission Sets

These acted as add-ons, granting additional permissions for specific tasks without altering a user's core profile. I created three permission sets for Sales, Inventory, and Marketing with their respective access levels.

3.6. Email Templates and Alerts

I created and configured an Order Confirmation Email Template to be used whenever customers successfully place an order. I also developed the remaining required email templates, such as those for marketing, follow-ups, and system notifications, to maintain a consistent communication style across the organization. In addition, I set up an email alert that uses these defined templates to notify customers or internal teams whenever specific conditions are met.

3.7. Flows (Automation Tools)

I built a flow that automatically sends the Order Confirmation Email to customers after their order is confirmed, ensuring a timely and seamless experience. To support inventory management, I created a record-triggered flow that monitors product stock levels and sends a Stock Alert Email to the inventory manager whenever levels fall below a defined threshold. Finally, I configured a scheduled flow that sends recurring or time-based notifications, such as weekly stock reports, reminders, or updates, which helped keep stakeholders consistently informed without manual effort.

3.8. Apex Code

In this part of the project, I developed custom Apex Classes and Triggers to handle validations and automate processes that couldn't be achieved with configuration alone.

I created an OrderTriggerHandler class to validate order quantities based on status and an OrderTrigger to call this logic before insert and update. This ensured that every order followed the required business rules automatically.

I also built an InventoryBatchJob class to monitor product stock. It restocks items when quantities fall below ten and was scheduled to run daily using the System.schedule method. This automation helped maintain accurate inventory levels without manual effort.

4. Conclusion

The Salesforce CRM built for HandsMen Threads represents a significant step forward in how the company manages its operations. The solution integrates customer management, order processing, inventory tracking, and marketing campaigns into a single cohesive system. With features like automated workflows, Apex logic, validation rules, and real-time reporting, HandsMen Threads now enjoys greater efficiency, improved accuracy, and enhanced customer satisfaction.

The platform has created a strong foundation for sustainable business growth, enabling the company to operate smarter, respond faster, and deliver more personalized customer experiences.