

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

ABSTRACT

The HandsMen Threads CRM system is a comprehensive, Salesforce-based solution designed for a premium men's fashion brand. The project aims to streamline business operations such as customer management, order tracking, inventory control, marketing, reporting, and customer loyalty programs. Through a combination of automation, analytics, and clean interface design, the HandsMen Threads app enhances operational efficiency while ensuring a personalized and engaging experience for every customer.

This CRM application was developed during a Salesforce Virtual Internship, showcasing the power of custom objects, flows, and Apex triggers within the Salesforce ecosystem.

Objectives of the Project

- To build a fully functional CRM system tailored for a men's fashion retail brand.
- To use Salesforce tools for automating routine business processes like order confirmation and stock monitoring.
- To enable effective marketing and customer engagement through flows and campaigns.
- To apply custom development and configuration such as custom objects, custom apps, Apex triggers, and flows.
- To improve user decision-making via real-time dashboards and reports.

Technology Description

The project is built entirely within the Salesforce CRM platform using the following features and technologies:

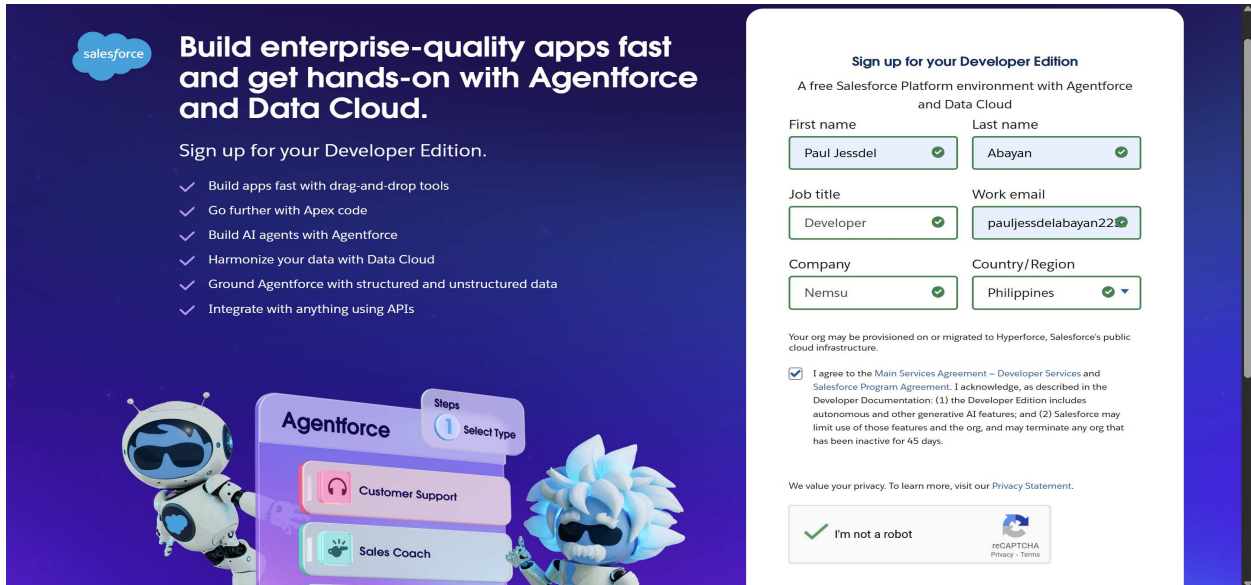
- **Custom App:** A fully customized app named HandsMen Threads that includes all the major CRM tabs.
- **Custom Objects:**
 - HandsMen Customers
 - HandsMen Orders
 - HandsMen Products
 - Inventories
- **Standard Objects Used:**
 - Accounts
 - Contacts
 - Campaigns
 - Reports
 - Dashboards
- **Automation Tools:**
 - Flow Builder
 - Order Confirmation Flow
 - Low Stock Alert Flow
 - Loyalty Program Flow
- **Apex Triggers:**
 - OrderTotalTrigger (calculates total order amount)
 - StockDeductionTrigger (deducts inventory automatically)
- **Profiles & Permissions:**
 - Configured different profiles for admin and users to control access to various tabs.
- **Marketing Campaign Management:**
 - Campaign object configured to manage promotional activities.
- **Reports & Dashboards:**
 - Visual summaries of sales trends, customer activity, inventory levels, and loyalty program participation.

IV. Detailed Explanation of Project Phases

Phase 1: Salesforce Developer Org Setup

A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>

Account verification and password configuration were completed.



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First name: Paul Jessdel ✓ Last name: Abayan ✓


Job title: Developer ✓ Work email: pauljessdelabayan22 ✓

Company: Nemsu ✓ Country/Region: Philippines ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Phase 2: Custom Object Creation

Five custom objects were created:

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Loyalty Tiers

Steps followed:

Navigation to: Setup > Object Manager > Create > Custom Object

Fields and relationships were configured for each object.

Phase 3: Creating the Lightning App

A Lightning App named *HandsMen Threads* was created.

Tabs included in the app:

- HandsMen Customers
- HandsMen Orders
- HandsMen Products
- Inventories
- Marketing Campaigns
- Reports
- Dashboards
- Accounts
- Contacts

Phase 4: Validation Rules

Implemented validation rules to ensure data accuracy:

- Prevent zero or negative quantities in Orders.
- Validate required fields for customer records.

Phase 5: User Role and Profile Setup

- Created custom profiles for Admin, Manager, and Staff.
- Assigned tab-level and field-level permissions based on user roles.

Phase 6: User Creation

- Multiple users were created and assigned to specific roles.
- Profiles applied to control object access and visibility.

Phase 7: Email Template Alerts

Email templates were created for:

- Order Confirmation
- Low Stock Notification
- Loyalty Tier Upgrade

Phase 8: Flow Implementation

Built the following flows using Flow Builder:

- **Order Confirmation Flow** – Calculates total order value and sends email.
- **Low Stock Alert Flow** – Alerts when inventory falls below threshold.
- **Loyalty Program Flow** – Automatically upgrades loyalty tier.

Phase 9: Apex Trigger Development

Developed custom Apex Triggers:

- **OrderTotalTrigger** – Calculates order total during insert/update.
- **StockDeductionTrigger** – Deducts stock based on order quantity.

Phase 10: Project Explanation with Real-World Example

Demonstrated how the app works using a real-world scenario:

- A customer places an order.
- The system calculates the total, adjusts inventory, and confirms the order.
- If the product is low in stock, an alert is sent.
- When the customer reaches a loyalty milestone, they are upgraded and notified.

SCREENSHOT

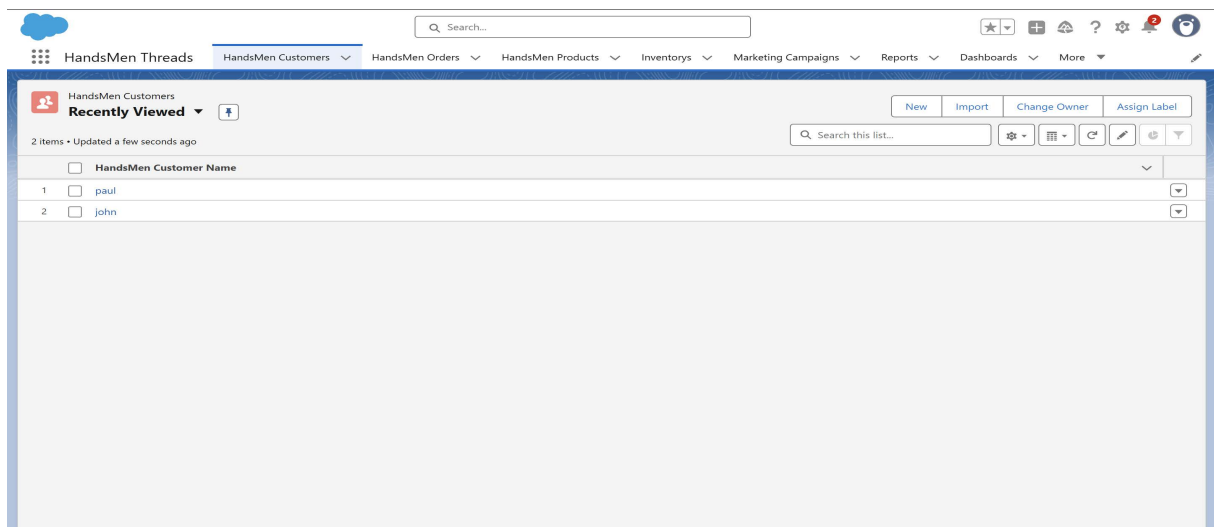


FIG: HANDSME CUSTOMER TAB

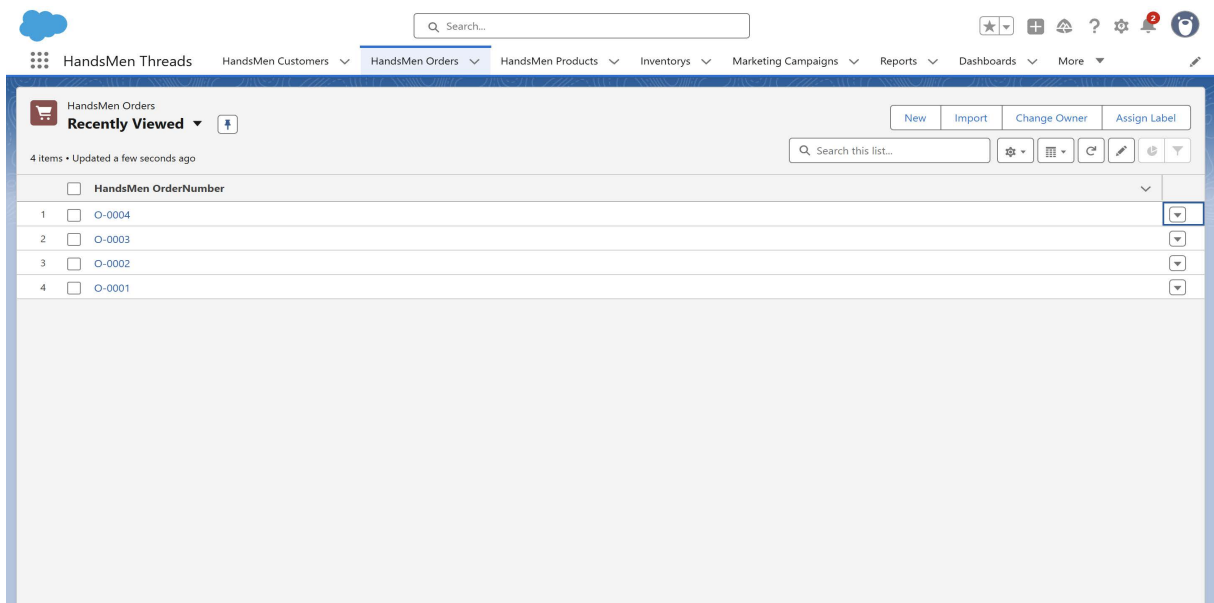


FIG: HANDSMEN ORDERS

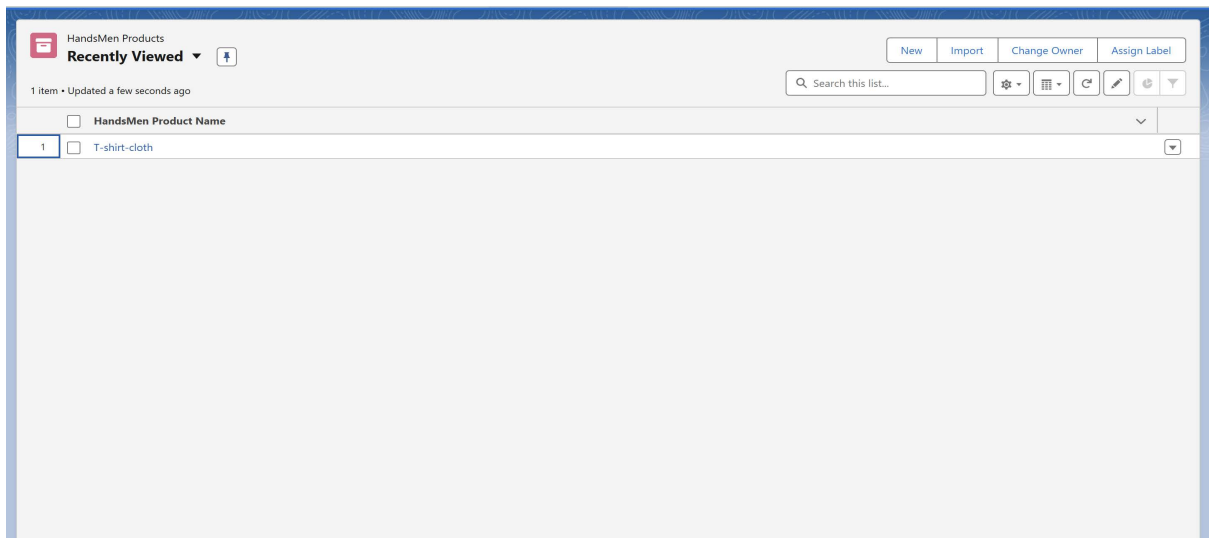


FIG: HANDSMEN PRODUCTS

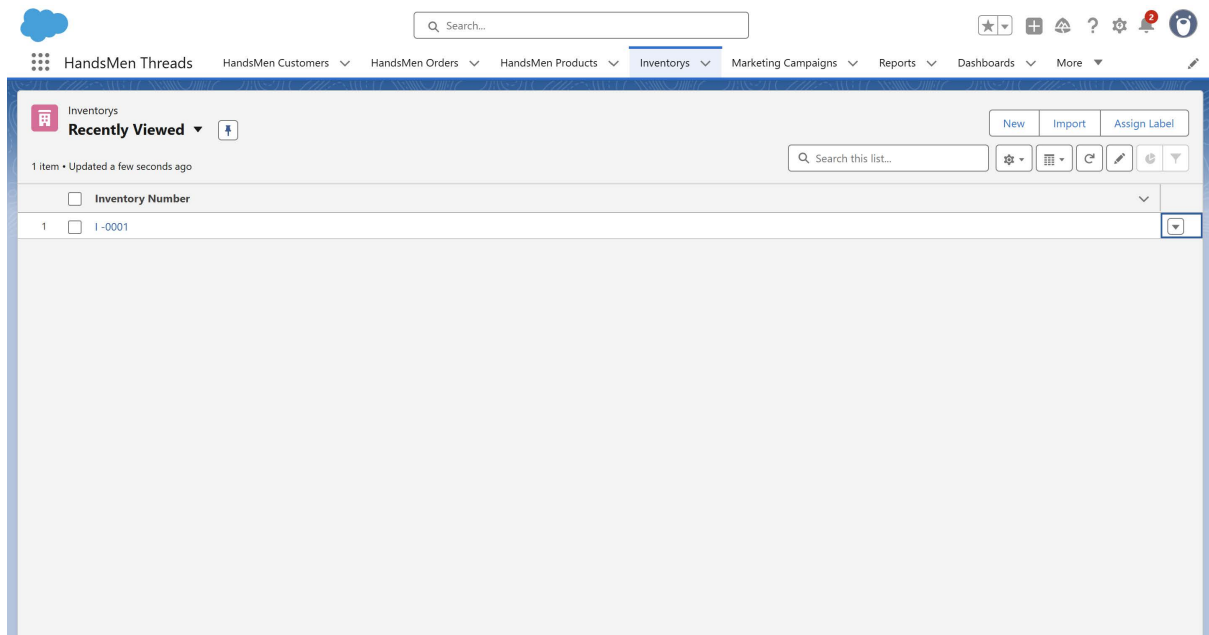


FIG: INVENTORY

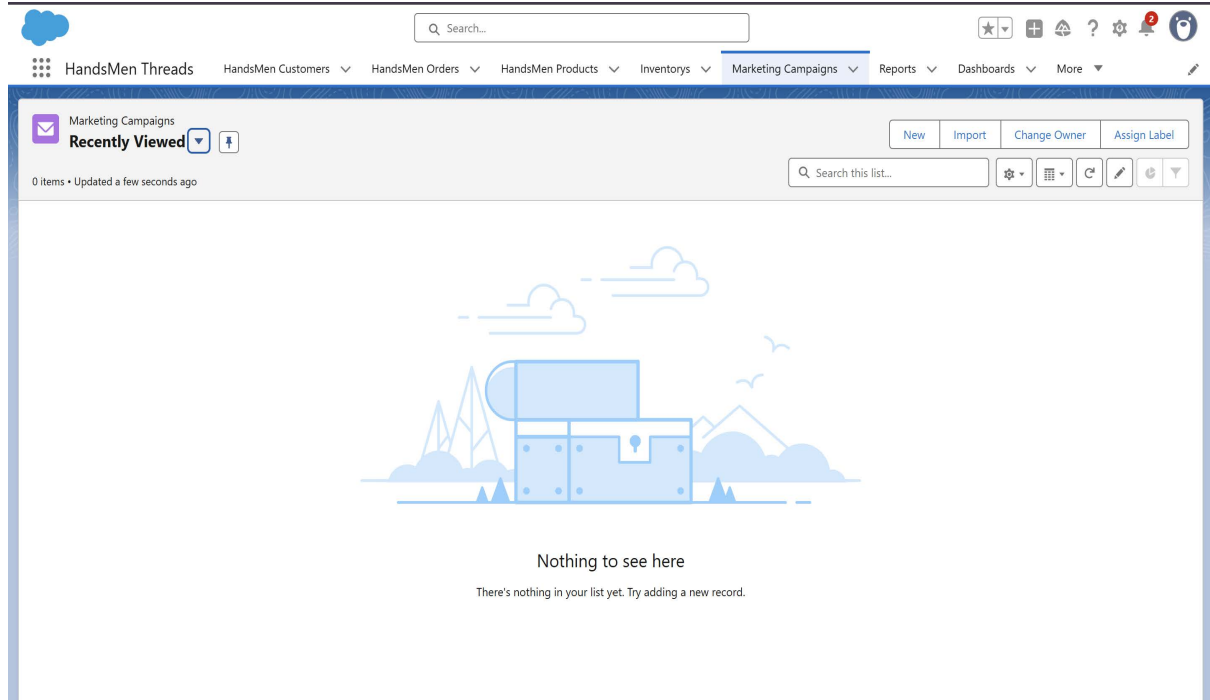


FIG: MARKETING CAMPAIGNS

The screenshot shows the 'Reports' section of the HandsMen application. The top navigation bar includes 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', 'Dashboards', and 'More'. The 'Reports' section has a search bar and a 'New Report' button. Below the search bar, there is a table with the following columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains several rows of reports, including 'Exercise Completion by Days to Complete', 'Exercise Completion by User', and 'Exercise Completion Status'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Summer '24	Automated Process	7/30/2025, 7:30 AM	
Created by Me	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Spring '24	Automated Process	7/30/2025, 7:30 AM	
Private Reports	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Summer '24	Automated Process	7/30/2025, 7:30 AM	
Public Reports	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Spring '24	Automated Process	7/30/2025, 7:30 AM	
All Reports	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Summer '24	Automated Process	7/30/2025, 7:30 AM	
FOLDERS	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Summer '24	Automated Process	7/30/2025, 7:30 AM	
All Folders	Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Enablement Dashboard Reports Summer '24	Automated Process	7/30/2025, 7:30 AM	
Created by Me		Analyze an exercise's completion status based on program sections.				
Shared with Me		Analyze an exercise's completion status based on program sections.				
FAVORITES		Analyze an exercise's completion status based on program sections.				
All Favorites		Analyze an exercise's completion status based on program sections.				

FIG: REPORTS

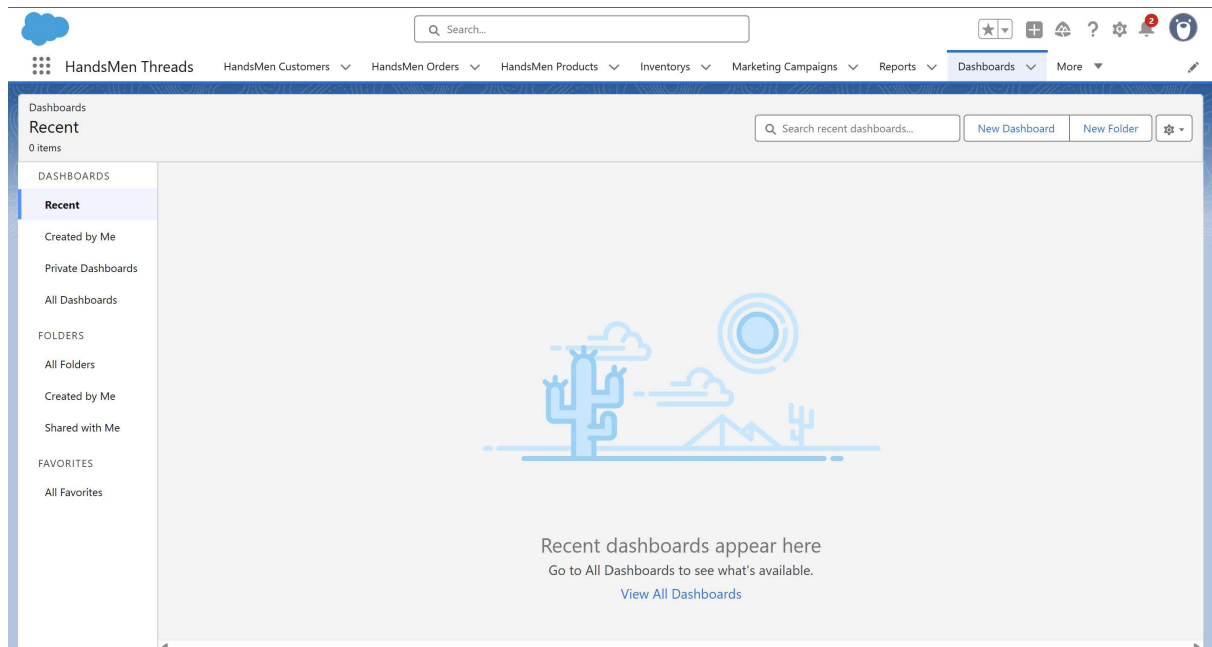


FIG: DASHBOARD

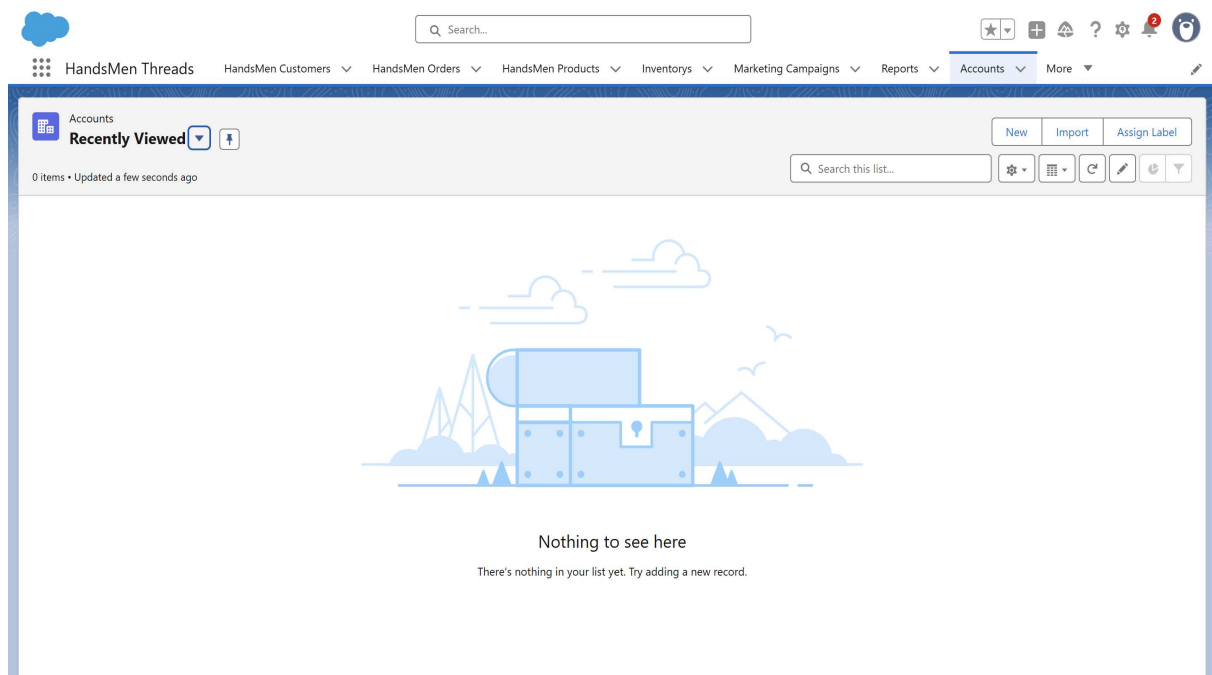


FIG: ACCOUNTS

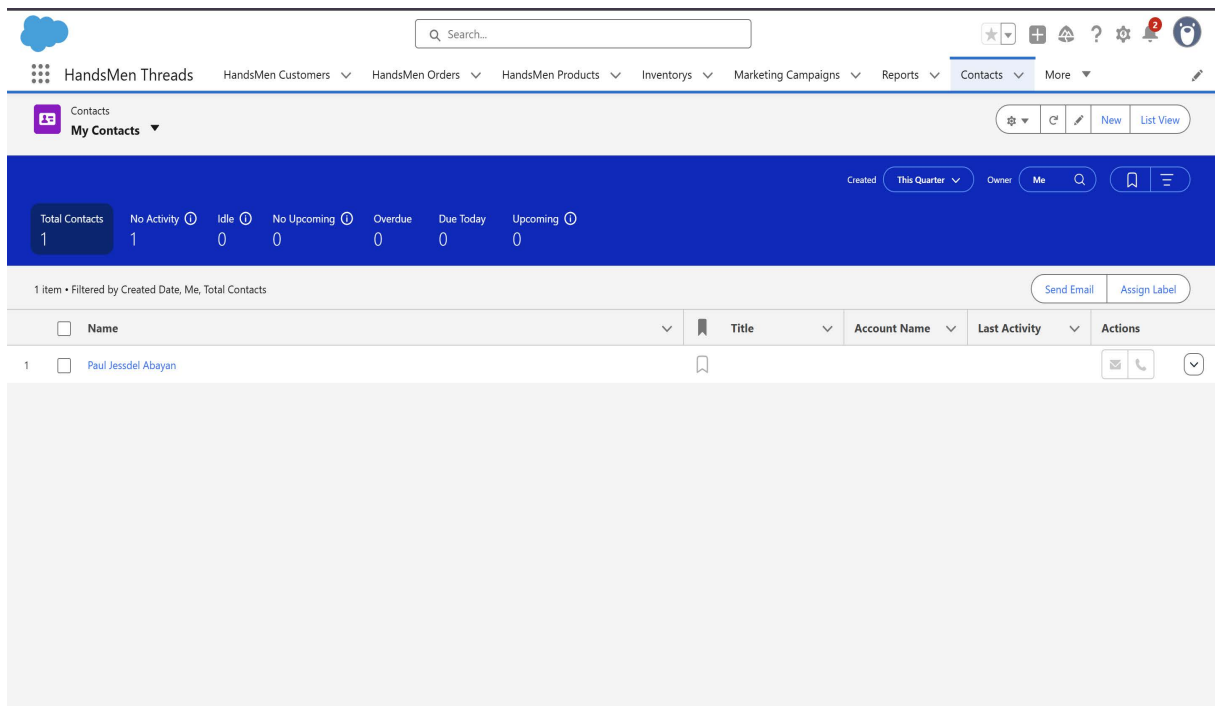


FIG: CONTACTS

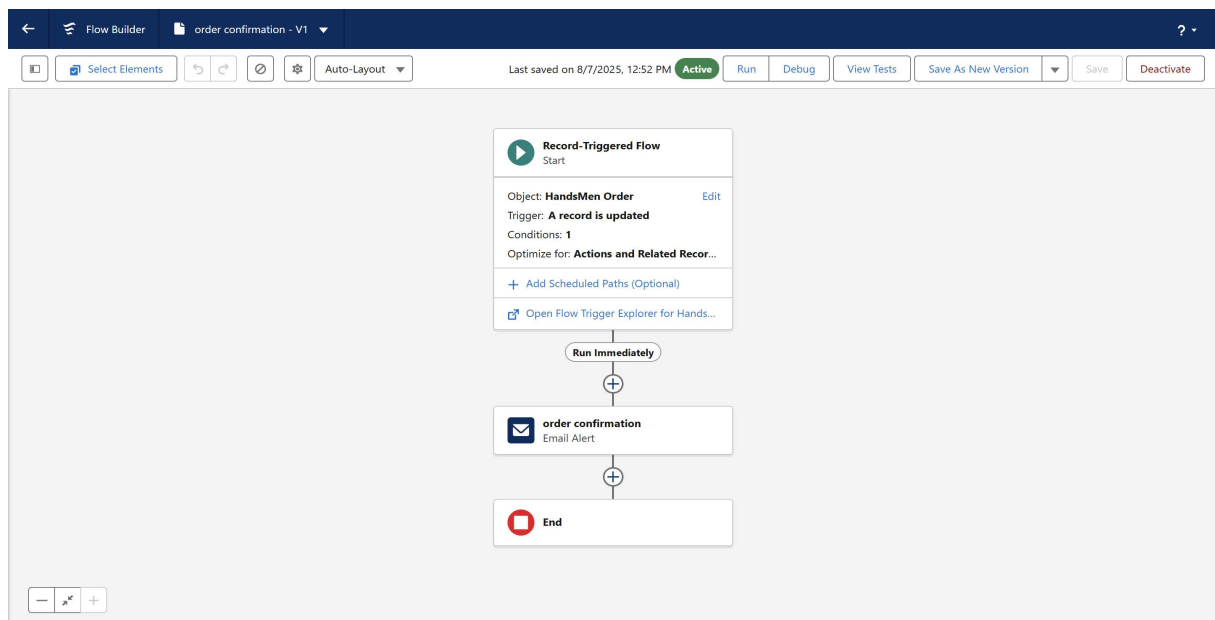


FIG:ORDER CONFIRMATION

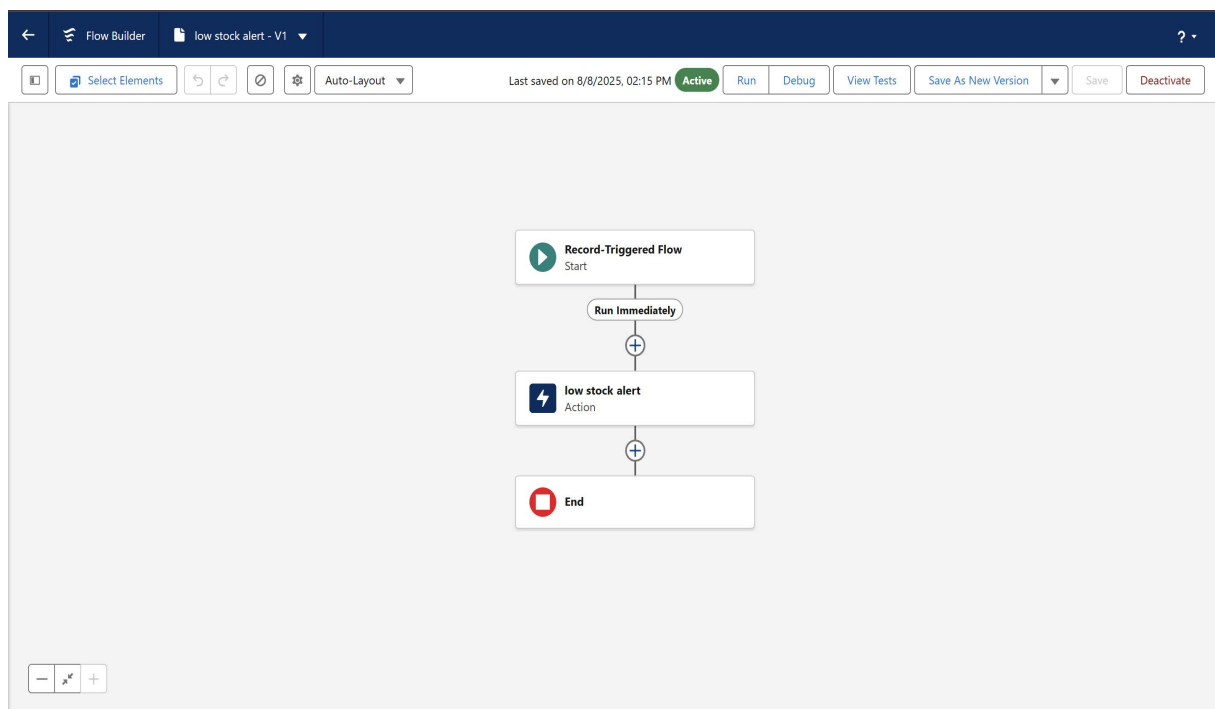


FIG: LOW STOCK ALERT

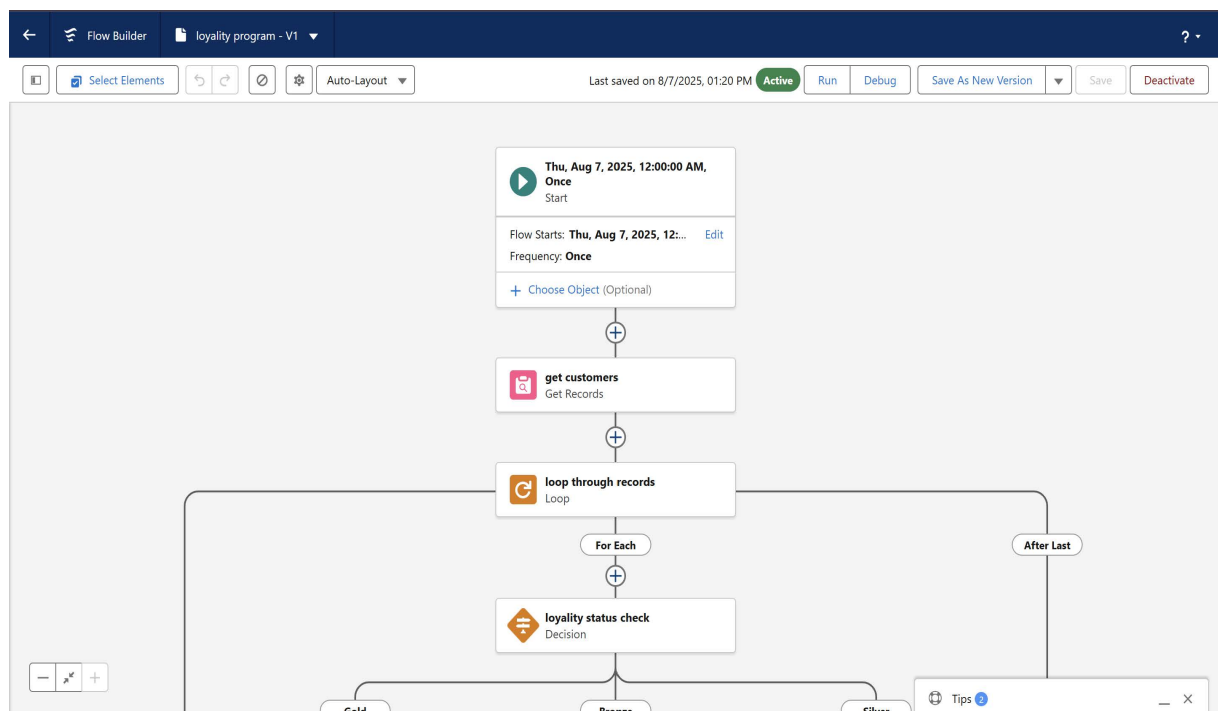


FIG: LOYALTY PROGRAM

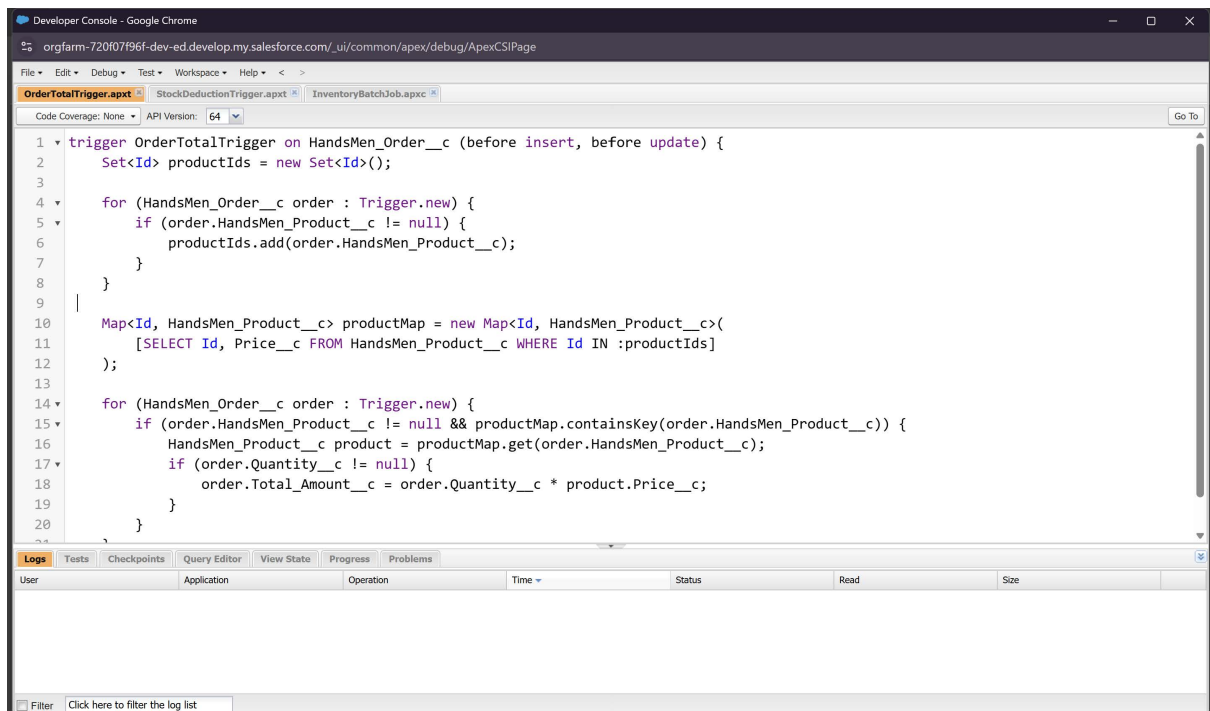


FIG:ORDERTOTALTRIGGER

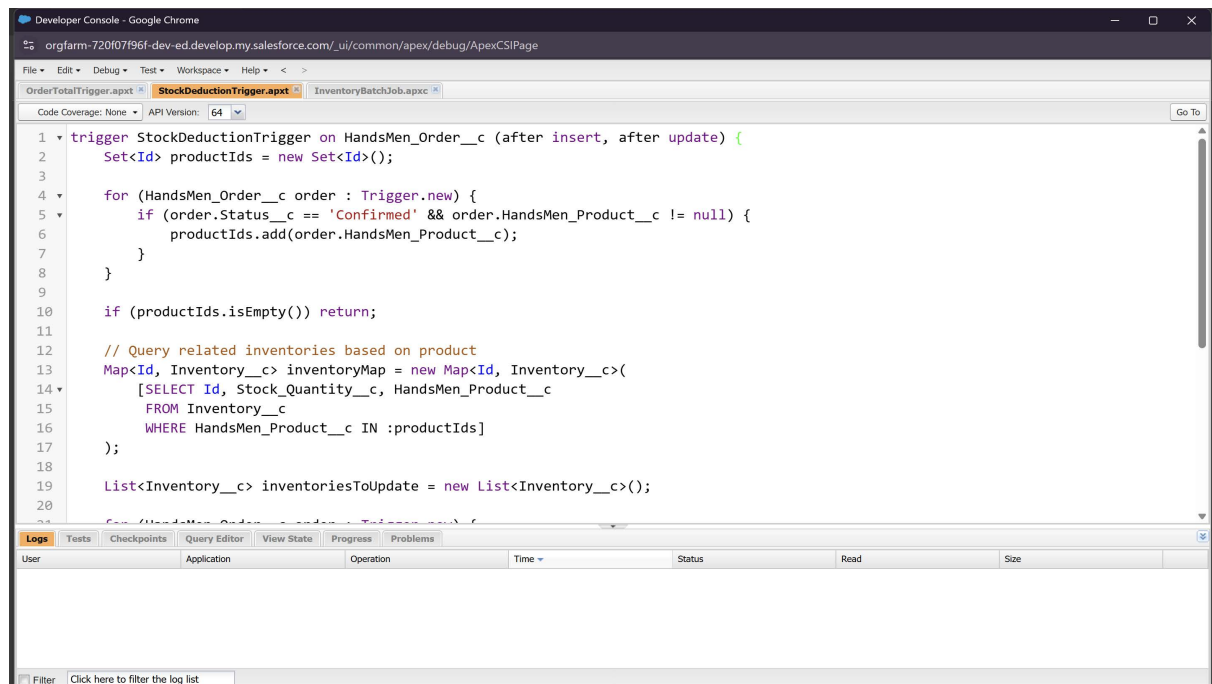


FIG:STOCKMODERATIONTRIGGER

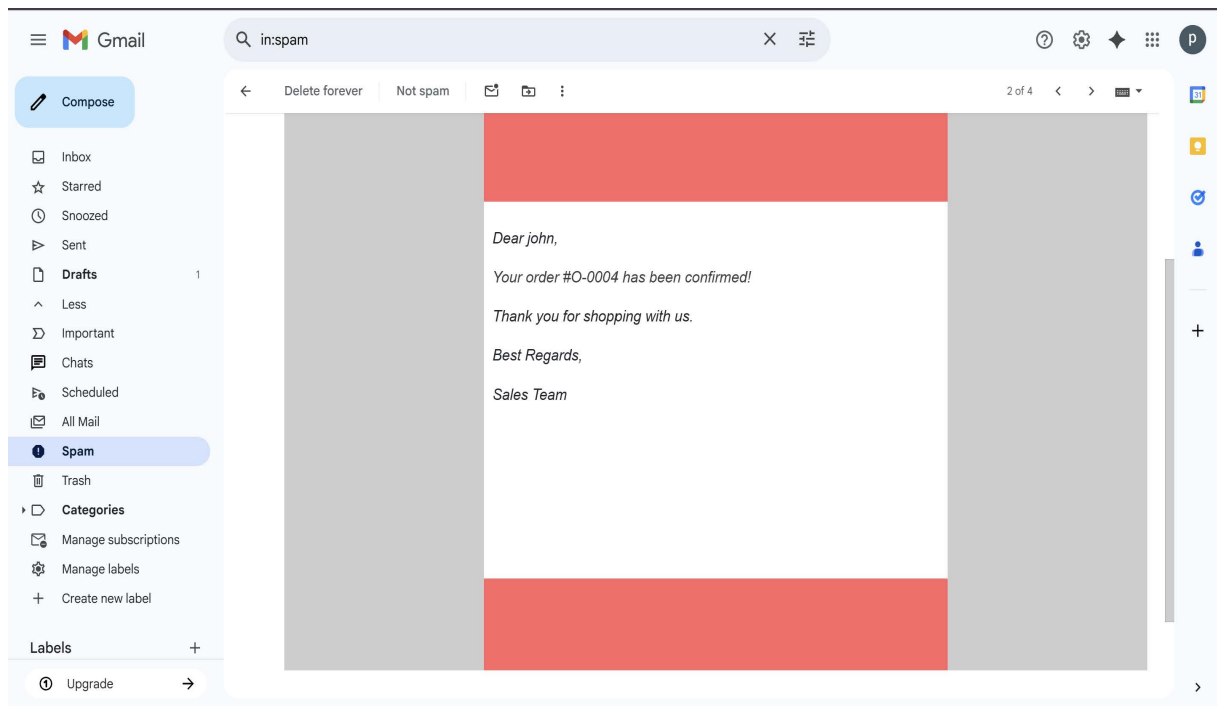


FIG: ORDER CONFIRMATION EMAIL

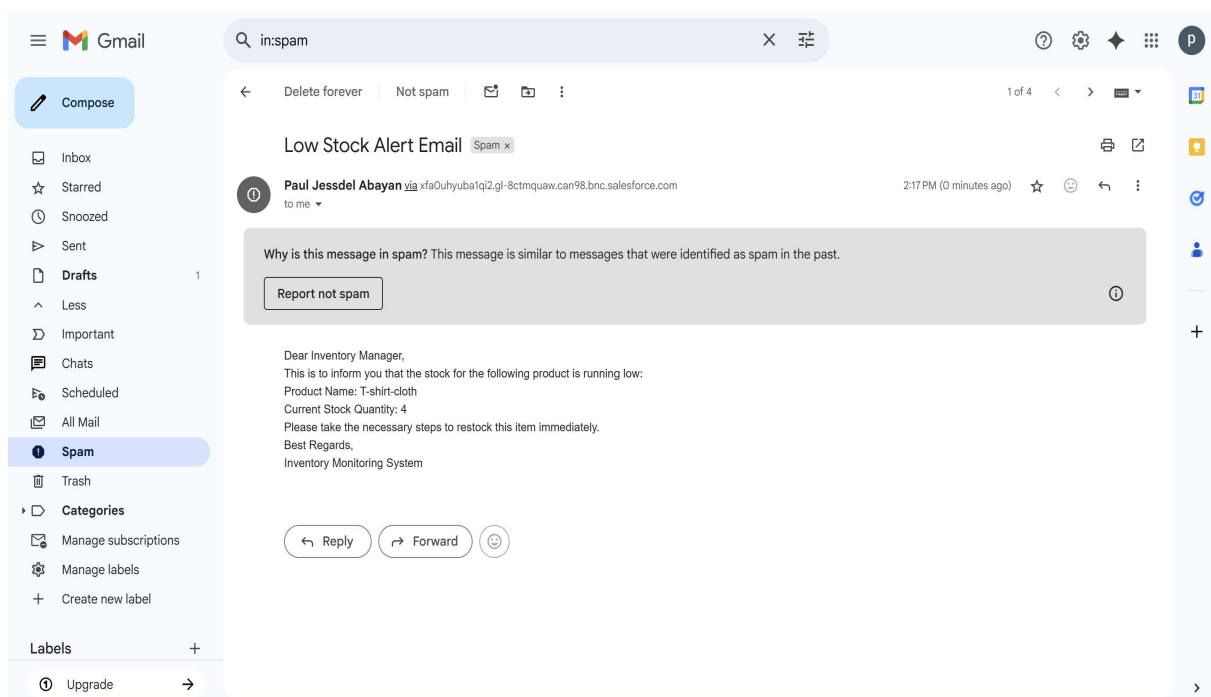


FIG: LOW STOCK ALERT EMAIL

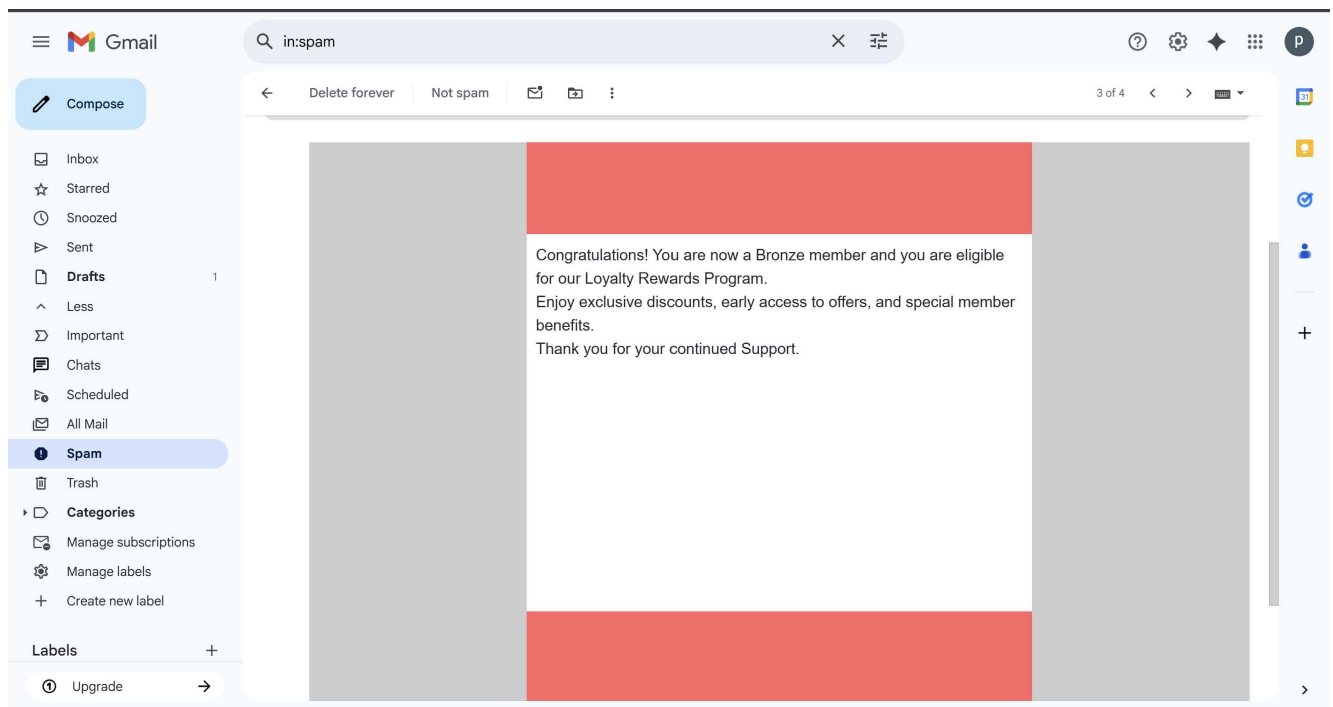


FIG: LOYALTY PROGRAM EMAIL

Conclusion and Future Scope

The HandsMen Threads project demonstrates the potential of Salesforce to build a retail CRM solution tailored to industry needs. By automating tasks like inventory tracking and customer rewards, it improves both operational efficiency and user satisfaction.

Future Scope:

- Integrate SMS notifications for low stock and loyalty updates.
- Expand marketing features with multi-channel outreach.
- Implement product recommendation engine using AI.
- Add visual product gallery for more dynamic UI.
- This project has strengthened both my technical Salesforce skills and my ability to apply CRM strategies in real-world retail use cases.