

Submitted by: Jerome Avecilla

Requirements to: Bulacan State University - College of Information Communication Technology (CICT) | Salesforce

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

ABSTRACT: HandsMen Threads CRM Documentation

This document outlines the **end-to-end implementation** of a bespoke **Salesforce Customer 360 solution** for HandsMen Threads, a luxury men's tailoring brand. The **strategic imperative** was to **optimize operational bandwidth, amplify customer lifetime value (CLV), and mandate data governance** across the organizational matrix.

The solution is anchored by a **robust, scalable data architecture** leveraging five core custom objects: **Client (Customer)**, **Transaction (Order)**, **SKU (Product)**, **Stock (Inventory)**, and **Outreach (Marketing Campaign)**. We **drove process efficiency** by **automating mission-critical workflows** utilizing declarative (Record-Triggered/Scheduled Flows, Email Alerts) and programmatic (Apex) tools, focusing on **instantaneous transaction confirmation, dynamic loyalty tier calibration, and proactive just-in-time stock replenishment alerts**.

We **prioritized data hygiene** via **stringent validation logic** and fortified the system through a **granular, role-based security framework** tailored for the Sales, Fulfillment, and Engagement pods. Crucially, a **scheduled asynchronous batch process (Apex)** was deployed to **regularly recalibrate low-stock quantities**, ensuring inventory data is always **up-to-the-minute**.

This **transformative CRM deployment** is designed to **elevate the bespoke client journey** through **hyper-personalized communication**, **ensure operational excellence through radical automation**, and provide a **future-proof, scalable infrastructure** built on the Salesforce Platform, thus **positioning HandsMen Threads for exponential market penetration**.

PROJECT OBJECTIVES & KEY RESULTS (OKRs)

The **core objective** of this engagement is to **architect and deploy a mission-critical Salesforce CRM ecosystem** for HandsMen Threads. This initiative is **strategically aligned to de-risk operational bottlenecks, enforce a single source of truth (SSOT), and ultimately, propel customer experience (CX) metrics** to best-in-class standards.

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By consolidating core functional areas **Client Relationship Management, Transaction Lifecycle, SKU Management, Inventory Fulfillment, and Digital Outreach** into a **centralized platform**, this project will achieve the following **Key Results (KRs)**:

- **Process Optimization:** Maximize efficiency by leveraging intelligent automation (Flows/Apex) to instantaneously finalize order acknowledgments, dynamically update loyalty tiers, and issue just-in-time stock alerts.
- **Data Governance & Quality:** Establish non-negotiable data integrity across the board by mandating stringent validation protocols, thereby minimizing data drift and ensuring audit readiness.
- **Real-Time Business Intelligence:** Drive immediate business agility by providing real-time, granular visibility into inventory status and the full customer journey (360-degree view).
- **Organizational Synergy:** Enhance cross-functional collaboration and mitigate risk through the deployment of a robust, need-to-know, role-based access control (RBAC) model.
- **Customer Lifetime Value (CLV) Amplification:** Curate a bespoke client relationship by enabling hyper-personalized communication streams and differentiated loyalty program engagement.

CORE TECHNOLOGY ARCHITECTURE

Salesforce Platform: The Digital Backbone

Salesforce is deployed as our **Strategic Customer 360 Platform**, serving as the **cloud-native, scalable engine** for all client interactions and operations. It provides a **harmonized blend of declarative, low-code functionalities** (e.g., Flows) and **robust, programmatic capabilities** (Apex) to deliver a **bespoke, enterprise-grade solution** without sacrificing **agility**.

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Data Modeling & Schema Design

Component	Function	Strategic Imperative
Custom Objects	The database tables holding mission-critical business data . They are the foundational architecture for all processes.	Client_c, SKU_c, Transaction_c, Stock_c, Outreach_c
Tabs	The UI entry points that facilitate immediate user access and management of the custom object data within the platform.	Drive User Experience (UX) by simplifying navigation.
Custom App	A curated grouping of tabs and functionalities, providing a bespoke workspace optimized for specific user teams	Maximize Workflow Efficiency for each functional pod.

Access, Security & Governance

Component	Function	Strategic Imperative
Profiles	Defines the baseline capabilities for a user group: what they can see, do, and edit . The minimum viable access layer.	Mandates Core System Behavior and permissions.
Roles	Governs data visibility within the organizational hierarchy . Determines who sees whose records (e.g., Sales Manager sees their team's pipeline).	Enforces Data Segmentation and reporting structure.
Permission Sets	Provides additive permissions to users, allowing for agile, exception-based access without modifying the	Enables Granular Access Control and system agility.

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	core Profile.	
Validation Rules	Non-negotiable data quality gates that enforce business rules upon data entry, blocking non-compliant data.	Guarantees Data Integrity and Audit Readiness.

Automation & Business Logic

Component	Function	Strategic Imperative
Flows	The low-code automation engine . Used to orchestrate complex business processes, trigger notifications, and update records declaratively .	Drives Operational Efficiency and Scalability.
Apex (Programmatic)	Salesforce's proprietary object-oriented language . Utilized for complex, high-volume, or synchronous/asynchronous logic that cannot be met by Flows.	Enables Highly Customized, Mission-Critical Logic (e.g., Total_Amount__c recalculations, batch inventory updates).
Email Templates / Alerts	Standardized, on-brand communication assets used to automatically trigger personalized outreach (e.g., Instant Confirmation upon transaction).	Amplifies Customer Engagement and provides instant service delivery .

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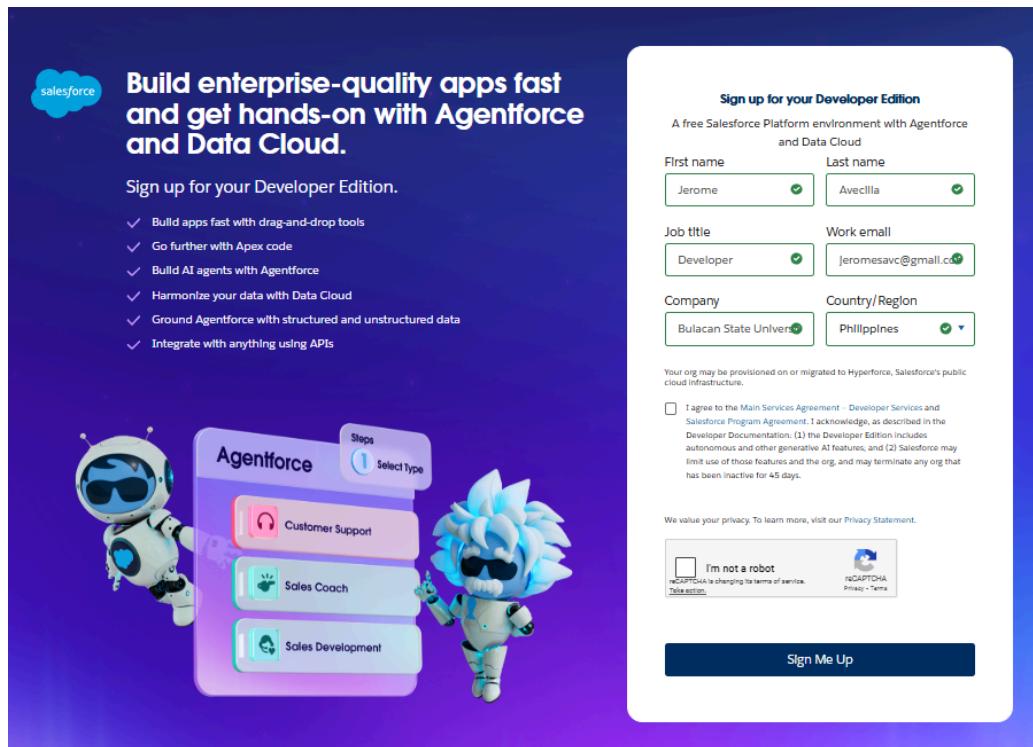
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INFRASTRUCTURE ACTIVATION & DATA ARCHITECTURE BLUEPRINT

1. Developer Environment Provisioning (Go-Live Readiness)

The initial phase zeroed in on establishing the foundational digital sandbox.

- A Salesforce Developer Org was created using
<https://developer.salesforce.com/signup>
- The account was verified, password set, and access was granted to the Salesforce Setup page.



2. High-Impact Custom Data Modeling (Schema Lock-Down)

The project's **data integrity** hinges on a **scalable, normalized schema**. Five **business-critical custom objects** were created to serve as the **single source of truth (SSOT)** for HandsMen Threads.

Custom Object	Strategic Data Payload	Value Proposition
HandsMen Client	Client demographics, contact protocols (Email, Phone), Dynamic Loyalty Status .	Amplifies CLV through segmented personalization.
HandsMen SKU	Product catalog data, Standard Costing (Price) , Current Stock Volume .	Enables Real-Time Pricing and product tracking.
HandsMen Transaction	Purchase history, Order Status , Quantity	Optimizes Fulfillment Logistics and sales

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	breakdown.	reporting.
Stock Fulfillment	Warehouse Location, Inventory Quantity Tracking.	Ensures Just-in-Time Replenishment capability.
Digital Outreach	Campaign scheduling, performance metrics, target segmentation.	Drives ROI by linking marketing effort to sales results.

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section with 11 items, sorted by Field Label. The table lists fields such as 'Created By', 'Email', 'FirstName', 'FullName', 'HandsMen Customer Name', 'Last Modified By', 'LastName', 'Loyalty Status', 'Owner', 'Phone', and 'Total Purchases'. Each row includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status.

3. Customized User Interface Deployment (Console Provisioning)

A bespoke Lightning Experience Application was engineered to provide a **streamlined, role-specific workspace** for HandsMen Threads personnel.

This initiative was key to maximizing **user adoption and workflow efficiency**.

- **Application Name: HandsMen Threads Console**
- **Strategic Functionality:** The App consolidates all **mission-critical navigation elements** (Tabs for Client, Order, SKU, Stock, Outreach) alongside **Business Intelligence Dashboards (Reports)**.
- **Initial Rollout:** The application was initially assigned to the **System Administrator Profile** for **UAT (User Acceptance Testing)** and sign-off, ensuring the **digital experience aligns** with the strategic blueprint before broader deployment.
- **Value Add:** This approach **mitigates context switching** and provides users with a **customized cockpit** focused solely on their **operational imperatives**.

4. Data Quality & Governance Mandate (Validation Rule Enforcement)

To enforce a **Single Source of Truth (SSOT)** and prevent **data hygiene degradation**, rigorous **Validation Rules** were implemented across key transactional and client objects. This ensures that all data entered **complies**

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with core business logic.

Object	Validation Logic	Strategic Rationale
HandsMen Transaction (Order)	Prevents record creation where the Total_Amount__c field is less than or equal to zero (\$0) .	Amplifies CLV through segmented personalization.
HandsMen Client (Customer)	Strict email format control requiring the inclusion of @gmail.com (as per initial specification).	Enables Real-Time Pricing and product tracking.

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' object. The 'Validation Rules' tab is selected. A validation rule named 'Email' is being edited. The 'Error Condition Formula' field contains the formula: NOT CONTAINS(Email__c , "@gmail.com"). The 'Error Message' field contains the message: Please fill Correct Gmail. The formula editor dropdown shows various functions like ABS, ABSNUMBER, AND, ASCII, ASIN, etc.

5. Access Control Deployment (Roles & Profiles Blueprint)

We established a **granular security model** to ensure data visibility and platform functions are **role-specific**, mitigating internal risk and promoting **operational focus**.

- **Custom Profile Creation:** The baseline **Standard User Profile** was cloned and configured as "**Platform 1**". This profile was then **permissioned** to allow required access to the custom objects (Client, Order, etc.).
- **Organizational Hierarchy (Roles):** We mapped key departmental functions into a role hierarchy for data visibility control:
 - **Sales Manager**
 - **Inventory Manager**

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- Marketing Team

6. User Onboarding & Access Assignment

New users were provisioned and immediately assigned their **designated roles and profiles** to enforce the access architecture from day one.

- **Role-Based Access (RBA) Examples:**
 - **Niklaus Mikaelson:** Assigned Sales Manager Role.
 - **Kol Mikaelson:** Assigned Inventory Manager Role.
- **Strategic Outcome:** This **role-based assignment** is key to **controlling data exposure** and ensuring users only interact with processes and data relevant to their **core responsibilities**.

7. Automated Communication & Service Delivery (Email Assets)

We developed a set of **standardized, high-impact email assets** paired with **automatic alerts** to elevate both the client journey and internal efficiency.

These templates are the **foundation** for hyper-personalized, timely communication.

Email Template	Trigger Event	Strategic Purpose
Transaction Confirmation	Order Status changes to Confirmed .	Ensures Instant Client Acknowledgment and reduces follow-up volume.
Inventory Warning	Stock quantity falls below the Critical Threshold (5 units) .	Drives Proactive Fulfillment and prevents stock-outs.
Loyalty Status Update	Client's loyalty tier is upgraded or modified .	Fosters Client Retention and acknowledges high-value behavior.