

HandsMen Threads:

Elevating the Art of

Sophistication in

Men's Fashion

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Project Overview

HandsMen Threads, a distinguished brand in men's fashion, is implementing a Salesforce CRM system to transform its data management processes and customer engagement strategy. The CRM solution is designed to ensure seamless information flow across departments—covering customer orders, loyalty tracking, inventory management, and automated communications. By centralizing operations in Salesforce, HandsMen Threads aims to enhance data integrity, operational efficiency, and customer satisfaction.

The project introduces key functionalities such as automated order confirmations, loyalty program tracking, proactive stock alerts, and scheduled bulk order updates which empowers the business to make informed decisions and deliver a superior customer experience.

Objectives

The primary objective of the Salesforce CRM implementation for HandsMen Threads is to leverage automation, data accuracy, and process integration to elevate both customer experience and business performance.

Specifically, the project aims to:

- Streamline order management and inventory tracking through automation.
- Improve customer loyalty and engagement via dynamic loyalty program updates.
- Ensure data consistency and accuracy with validation rules and triggered processes.
- Enhance decision-making with insightful reports and dashboards.
- Strengthen data security and compliance through a robust role-based access model.

Ultimately, this Salesforce CRM will enable HandsMen Threads to efficiently manage sales operations, ensure customer satisfaction, and sustain long-term business growth.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

The business analysis phase identified several operational challenges:

- Manual order tracking leading to data errors.
- Lack of centralized customer data and loyalty tracking.

- Delays in warehouse updates due to uncoordinated communication.
- Inefficient reporting on sales performance and inventory levels.

The Salesforce CRM solution addresses these issues by creating an integrated system where all business activities like customer orders, inventory updates, and automated communication to operate cohesively.

Defining Project Scope and Objectives

In Scope:

- Order, Inventory, and Customer Management modules.
- Workflow automations for confirmations, stock alerts, and loyalty updates.
- Apex and Batch jobs for scheduled operations.
- Reports and dashboards for management insights.
- Security model using roles and profiles.

Out of Scope:

- Integration with third-party e-commerce or payment systems.
- Mobile application deployment.

Data Model and Security Model

Custom Objects:

- **Customer__c** – Stores customer details and loyalty status.
- **Order__c** – Records order information including date, amount, and items purchased.
- **Inventory__c** – Tracks product availability and stock levels.
- **LoyaltyProgram__c** – Defines loyalty tiers based on purchase history.

Security Model:

- Role Hierarchy: Admin → Sales Manager → Sales Representative → Warehouse Staff.
- Profiles and Permission Sets configured to restrict data access by department.
- Field-level security applied to financial and loyalty-related fields.

Stakeholder Mapping

Stakeholder	Role	Responsibility
Project Sponsor	CEO	Provides funding and strategic direction
Business Analyst	Requirement gathering	Defines business logic and objectives
Salesforce Developer	Technical implementation	Configures automation, triggers, and Apex
Admin	Maintenance and user management	Manages profiles, permissions, and data
QA Tester	Testing	Conducts feature and performance testing

Execution Roadmap

Phase	Description	Timeline
Requirement Gathering	Identify core needs and scope	Week 1–2
Development & Customization	Configure Salesforce objects and automations	Week 3–6
Testing & Data Migration	Validate data integrity and system workflows	Week 7–8
Deployment	Move to production environment	Week 9
Maintenance	Monitor and optimize system	Ongoing

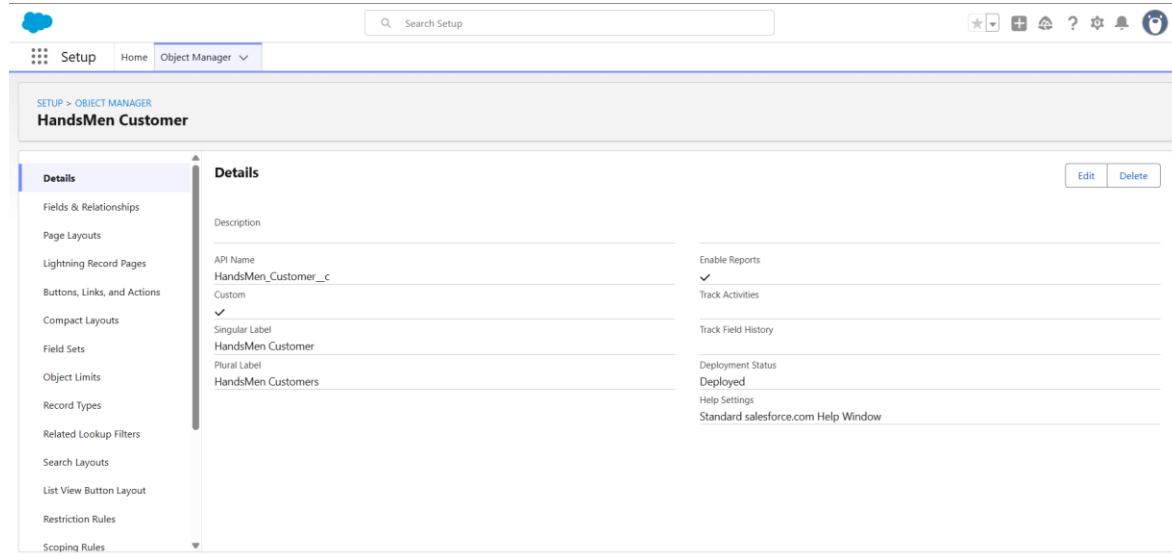
Phase 2: Salesforce Development – Backend & Configurations

Environment Setup & DevOps Workflow

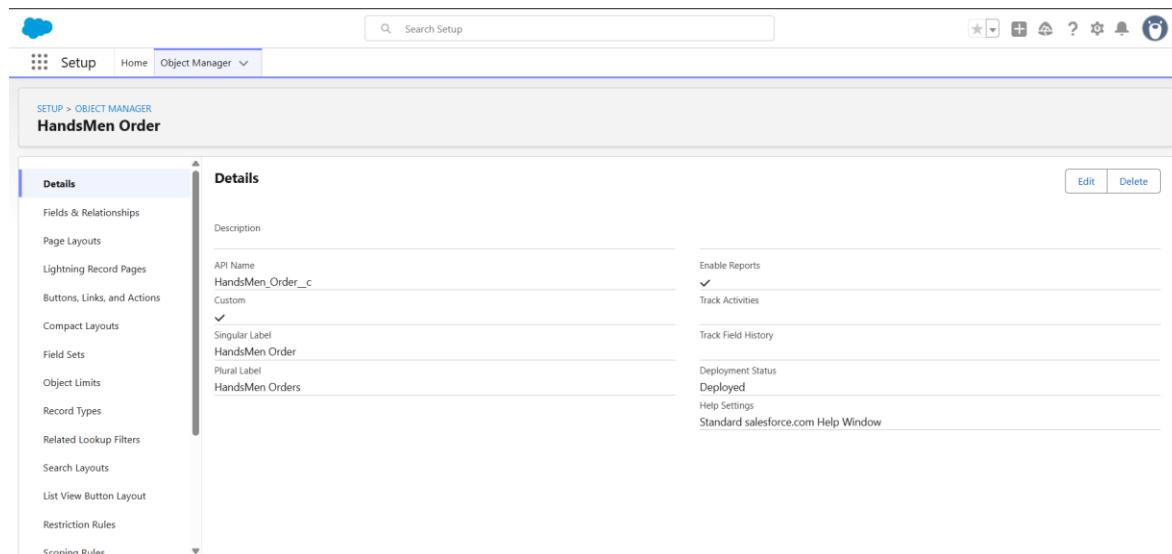
- Developer sandbox configured for customization.
- Change sets used for deployment from sandbox to production.
- Version control through GitHub for Apex and metadata tracking.

Custom Objects, Fields, and Validation Rules

Each object was designed with appropriate fields, lookup relationships, and master-detail links. Validation rules ensure data quality—such as preventing negative inventory values and ensuring loyalty points align with purchase totals.



The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' object. The left sidebar lists various configuration tabs: 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, and Scoping Rules. The main 'Details' tab displays the object's API name as 'HandsMen_Customer__c', its singular label as 'HandsMen Customer', and its plural label as 'HandsMen Customers'. On the right, there are sections for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. Top navigation includes Setup, Home, and Object Manager, along with standard Salesforce icons for search, refresh, and user profile.



The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Order' object. The left sidebar lists the same configuration tabs as the customer object. The main 'Details' tab displays the object's API name as 'HandsMen_Order__c', its singular label as 'HandsMen Order', and its plural label as 'HandsMen Orders'. On the right, there are sections for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. Top navigation includes Setup, Home, and Object Manager, along with standard Salesforce icons for search, refresh, and user profile.

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

Details

Description
API Name: HandsMen_Product_c
Custom
Singular Label: HandsMen Product
Plural Label: HandsMen Products

Actions

Edit | Delete

Enable Reports
✓
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

Inventory

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

Details

Description
API Name: Inventory_c
Custom
Singular Label: Inventory
Plural Label: Inventories

Actions

Edit | Delete

Enable Reports
✓
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

Marketing Campaign

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

Details

Description
API Name: Marketing_Campaign_c
Custom
Singular Label: Marketing Campaign
Plural Label: Marketing Campaigns

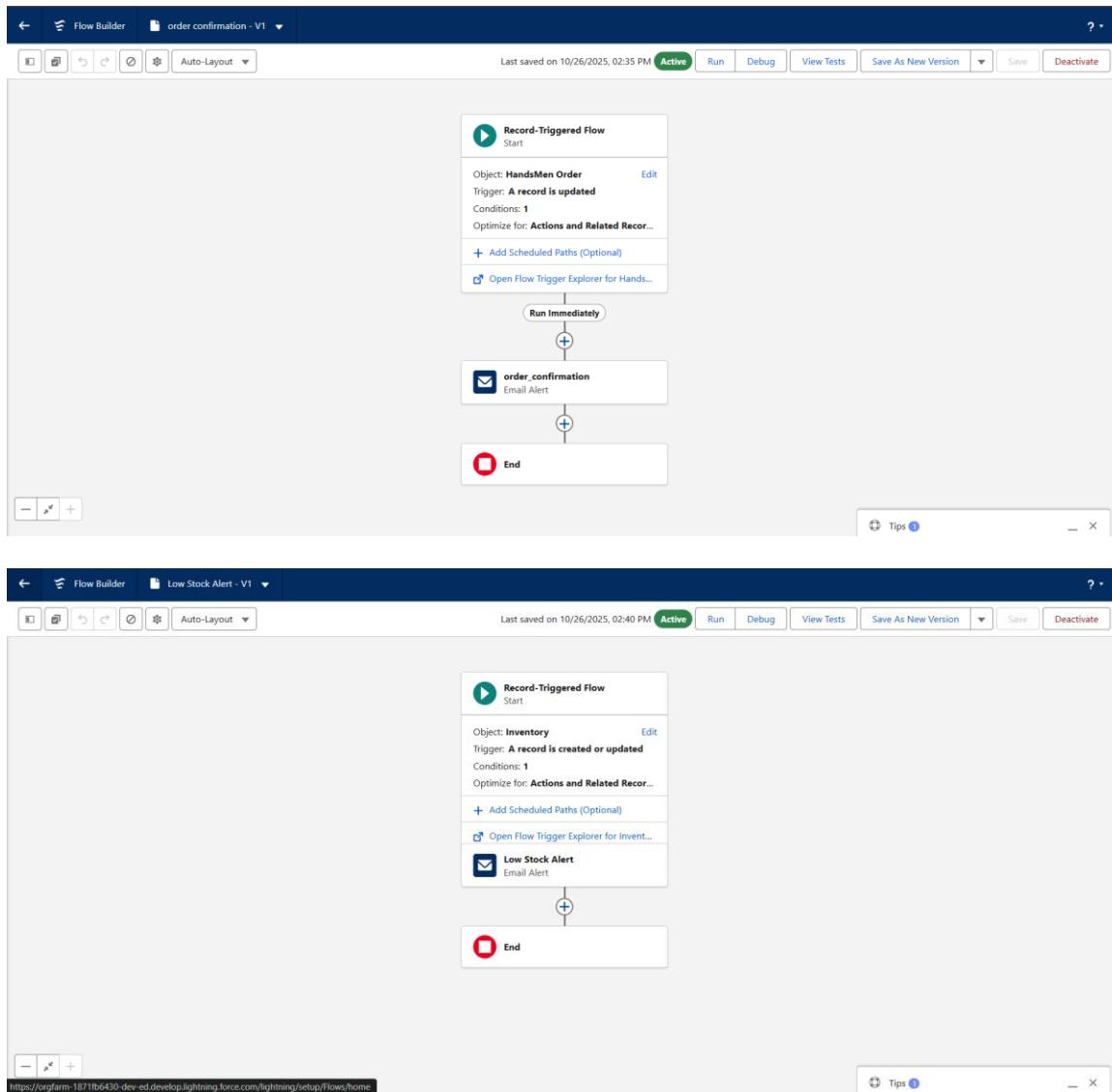
Actions

Edit | Delete

Enable Reports
✓
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Automation and Business Logic

- **Workflow Rules & Flows** for order confirmation emails and stock alerts.
- **Process Builder** to auto-update loyalty tiers.
- **Approval Process** for high-value orders exceeding ₦50,000.
- **Apex Triggers** for post-order updates to financial records.
- **Asynchronous Apex (Batch Jobs)** to process bulk orders nightly.



Flow Builder Loyalty Program - V1

Last saved on 10/26/2025, 04:26 PM Active Run Debug Save As New Version Save Deactivate

```

graph TD
    Start((Sat, Oct 25, 2025, 12:00:00 AM, Once Start)) --> GetCustomers[Get Customers  
Get Records]
    GetCustomers --> Loop[Loop Through Records  
Loop]
    Loop --> ForEach[For Each]
    ForEach --> LoyaltyStatus[Loyalty Status Check  
Decision]
    LoyaltyStatus --> AfterLast((After Last))
    
```

Code Coverage: None API Version: 65

```

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size

Filter Click here to filter the log list

```

1 *|trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3 
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9 
10    if (productIds.isEmpty()) return;
11 
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18 
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20

```

Phase 3: UI/UX Development & Customization

Lightning App Setup

A custom “**HandsMen Threads CRM**” Lightning App was created via the App Manager to consolidate all modules: Orders, Customers, Inventory, and Reports.

Page Layouts and Dynamic Forms

Dynamic forms were used to conditionally display loyalty and financial data depending on user role.

User Management

Profiles were assigned according to roles:

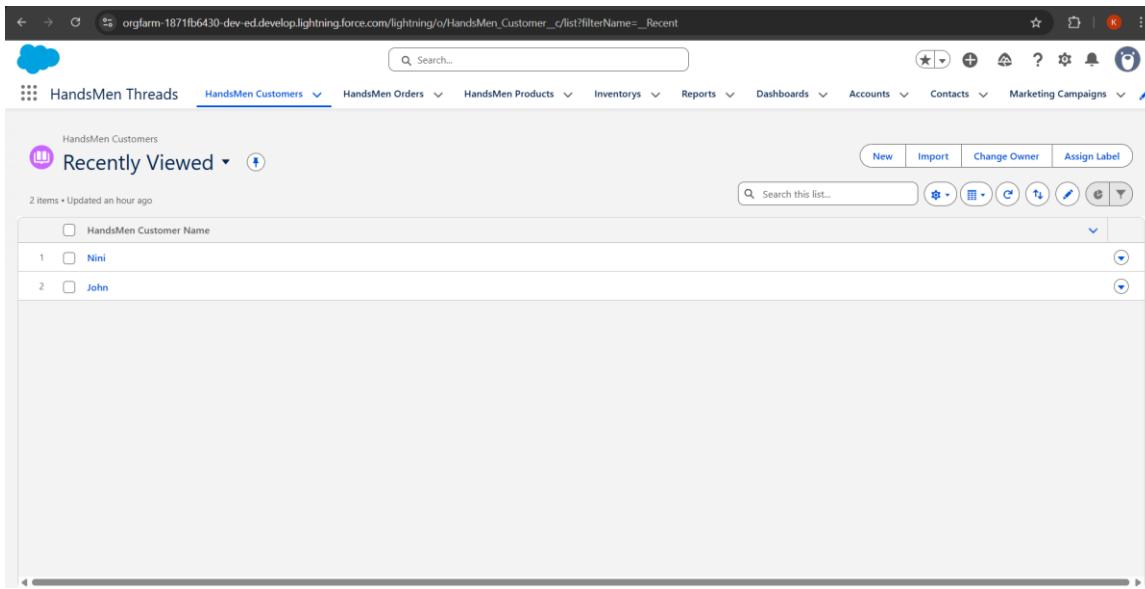
- **Admin Profile** – Full access.
- **Sales Profile** – Access to Orders and Customers.
- **Warehouse Profile** – Read/Write access to Inventory only.

Reports and Dashboards

Reports were created to monitor:

- Monthly Sales Summary.
- Top Loyal Customers.
- Inventory Restock Needs.

Dashboards display KPIs such as total revenue, stock status, and customer growth.



Phase 4: Data Migration, Testing & Security

Data Migration

- Data imported using **Data Loader** for bulk uploads of customers, orders, and inventory.
- Duplicate rules and matching rules enabled to prevent record duplication.
- Field history tracking implemented for key fields like Order Status and Stock Quantity.

Testing

Comprehensive test cases were developed and validated with screenshots:

Test Case	Input	Expected Output	Result
Order Creation	Customer places an order	Order record created, confirmation email sent	 Passed
Stock Alert	Stock < 5	Notification email to warehouse	 Passed
Loyalty Update	Customer hits purchase threshold	Loyalty tier auto-updated	 Passed

Batch Job	Midnight process	Bulk orders processed and stock updated	<input checked="" type="checkbox"/> Passed
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Security

- Profiles and Permission Sets ensure least-privilege access.
- Role hierarchy defines visibility across departments.
- Sharing rules applied for read-only access to cross-departmental data.

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy

- **Change Sets** used for migration from sandbox to production.
- Validation of deployment success using the Deployment Status log.
- Smoke testing performed post-deployment to confirm workflow integrity.

Maintenance and Troubleshooting

- Monthly reviews of system logs and reports.
- Admins trained for basic troubleshooting and issue escalation.
- Continuous monitoring of Apex jobs and error logs for exceptions.

Conclusion

The **HandsMen Threads Salesforce CRM** successfully integrates order management, customer engagement, and inventory automation in a single, scalable platform. Through process automation, Apex development, and robust data modeling, the project has improved operational efficiency, reduced human error, and strengthened customer loyalty.

With Salesforce at its core, HandsMen Threads now operates with better visibility, faster response times, and a data-driven approach to business decisions.

Future Enhancements

- Integration with e-commerce and payment gateways for online order tracking.
- Chatbot implementation using Salesforce Einstein for customer support.

- AI-based recommendation system for personalized marketing campaigns.
- Mobile-optimized Lightning app for on-the-go sales operations.