

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

Abstract

HandsMen Threads CRM is designed to streamline customer, inventory, and order management for a modern men's fashion brand focused on premium clothing and customer personalization. The CRM supports key business functions such as managing customer profiles, product catalog, orders, loyalty rewards, automation workflows, and marketing campaigns. With Salesforce as the foundation, the system ensures improved operational efficiency, better tracking of customer relationships, and enhanced business intelligence through dashboards and automated processes.

Objectives

The primary objective of the HandsMen Threads CRM is to centralize and optimize business operations by improving customer tracking, automating orders and marketing communication, and enhancing inventory management. The system will help the business deliver a more personalized and seamless experience to customers while increasing efficiency in sales and operations. By implementing key Salesforce features such as workflows, automation, dashboards, and custom objects, the CRM enables the business to scale while maintaining accuracy, quality service, and strong customer engagement.

Detailed Execution of Project Phases

Phase 1: Requirement Analysis & Planning

The CRM addresses the need for organized customer management, automated order processing, inventory monitoring, and marketing engagement for HandsMen Threads. The system ensures centralized tracking of customer profiles, buying history, product stock levels, and sales performance.

2. Defining Project Scope and Objectives

The scope includes creating custom objects (Products, Orders, Inventory, Campaigns), setting automation triggers for emails, assigning user roles for admin and sales staff, and generating reports and dashboards for insights.

3. Design Data Model and Security Model

Custom objects, field relationships, and roles (Admin, Sales Associate, Inventory Manager) were structured to maintain secure access and proper data sharing.

4. Stakeholders Mapping

Stakeholders include Business Owner, Sales Team, Inventory Manager, Marketing Team, and Internal Admin.

5. Execution RoadMap

Development → Configuration → UI build → Automation → Data Migration → Testing → Deployment → Maintenance.

Phase 2: Salesforce Development – Backend & Configurations

1. Setup Environment & DevOps Workflow

Setup environment and DevOps workflow for safe configuration

2. Customization of Salesforce Objects & Automation

Object Manager, Handsmen Products, Handmens Orders, Handsmen Customer Inventory, Marketing Campaigns.

The image consists of three vertically stacked screenshots of the Salesforce Object Manager setup page. Each screenshot shows a table of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed.

Screenshot 1 (Top): Shows three custom objects: Handsmen Customer, Handsmen Order, and Handsmen Product. All are Custom Objects, last modified on 11/06/2025, and deployed.

Label	API Name	Type	Description	Last Modified	Deployed
Handsmen Customer	Handsmen_Customer__c	Custom Object		11/06/2025	✓
Handsmen Order	Handsmen_Order__c	Custom Object		11/06/2025	✓
Handsmen Product	Handsmen_Product__c	Custom Object		11/06/2025	✓

Screenshot 2 (Middle): Shows four objects: Inventory, Inventory Item Reservation, Inventory Reservation, and Web Store Inventory Source. Inventory and Inventory Item Reservation are Custom Objects, while the others are Standard Objects. All were last modified on 11/06/2025.

Label	API Name	Type	Description	Last Modified	Deployed
Inventory	Inventory__c	Custom Object		11/06/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object		11/06/2025	
Inventory Reservation	InventoryReservation	Standard Object		11/06/2025	
Web Store Inventory Source	WebStoreInventorySource	Standard Object		11/06/2025	

Screenshot 3 (Bottom): Shows two objects: Marketing Campaign and Promotion Market Segment. Marketing Campaign is a Custom Object, while Promotion Market Segment is a Standard Object. Both were last modified on 11/06/2025.

Label	API Name	Type	Description	Last Modified	Deployed
Marketing Campaign	Marketing_Campaign__c	Custom Object		11/06/2025	✓
Promotion Market Segment	PromotionMarketSegment	Standard Object		11/06/2025	

3. Apex Development

Apex Classes (if applicable): (If you created example triggers such as automatic loyalty calculation.)

The image shows two side-by-side screenshots of the Salesforce Developer Console. Both windows have the title 'Code Coverage Name: [API Name]' and show Java-like code with annotations. The top window contains the following code:

```
22+     if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23+         for (Inventory__c inv : inventoryMap.values()) {
24+             if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25+                 inv.Stock_Quantity__c -= order.Quantity__c;
26+                 inventoryUpdates.add(inv);
27+             }
28+         }
29+     }
30+
31+
32+
33+     if (!inventoryUpdates.isEmpty()) {
34+         update inventoryUpdates;
35+     }
36+ }
```

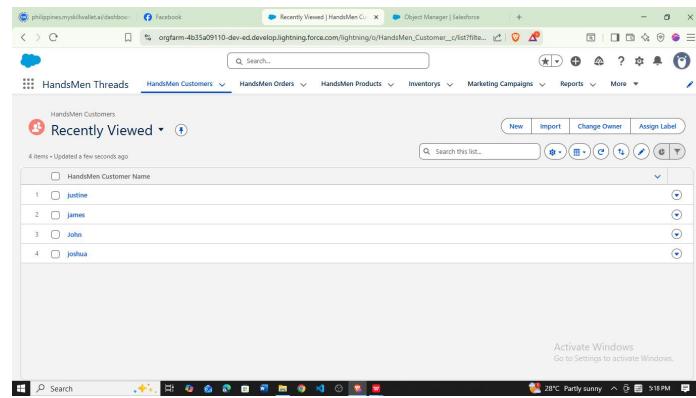
The bottom window contains the following code:

```
8
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>;
11    [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds];
12
13
14+   for (HandsMen_Order__c order : Trigger.new) {
15+       if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16+           order.Total_Amount__c = productMap.get(order.HandsMen_Product__c).Price__c * order.Quantity__c;
17+           if (order.Quantity__c != null) {
18+               order.Total_Amount__c = order.Quantity__c * product.Price__c;
19+           }
20+       }
21+   }
22+ }
```

Phase 3: UI/UX Development & Customization

1. Lightning App Setup

Create and configure Lightning App using App Manager.
Define navigation and app branding.



2. Page Layouts & Dynamic Forms

Design page layouts to optimize user workflow.
Use dynamic forms for field visibility based on user roles or conditions.

3. User Management

Create profiles, assign permission sets, and manage users. Screenshots to show user creation and profile assignments.

The screenshot shows the Salesforce Setup interface under the 'Users' section. The main area is titled 'All Users' and lists several users with their details:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Charlie Guard	Charlie	charlie.00000000000000000000000000000000@salesforce.com	✓	✓	Charlie Guard User
Edit	EDS: Sifraam	SIFRAAM	sifraam.00000000000000000000000000000000@salesforce.com		✓	System Administrator
Edit	Lorraine John	JRS	lorrainejohn.00000000000000000000000000000000@salesforce.com		✓	Lorraine John User
Edit	Makaren Katalin	KMK	makarenkatalin.00000000000000000000000000000000@salesforce.com	Marketing	✓	Platform_1
Edit	Makaren Katalin	KMK	makarenkatalin.00000000000000000000000000000000@gmail.com	Investor	✓	Platform_1
Edit	Makaren Nikolay	NMK	makarennikolay.00000000000000000000000000000000@salesforce.com	Sales	✓	Platform_1
Edit	User Integration	ISB	isb.00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
Edit	User Security	SSU	ssu.00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User

4. Reports and Dashboards

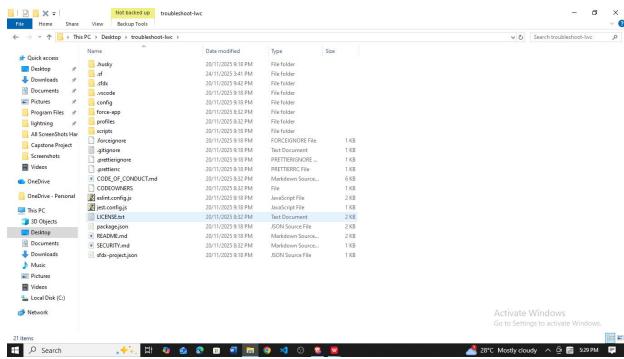
Design dashboards to visualize KPIs, booking trends, and customer insights. Include screenshots for all reports and dashboards.

The screenshot shows the Salesforce Reports page. The left sidebar lists 'RECENT' reports, 'FOLDERS', and 'FAVORITES'. The main area displays a placeholder message: 'Recent reports appear here. Go to All Reports to see what's available.' Below this is a search bar and a 'View All Reports' button.

The screenshot shows the Salesforce Dashboards page. The left sidebar lists 'RECENT' dashboards, 'DASHBOARDS', 'FOLDERS', and 'FAVORITES'. The main area displays a placeholder message: 'Recent dashboards appear here. Go to All Dashboards to see what's available.' Below this is a search bar and a 'View All Dashboards' button.

5. Lightning Web Component (LWC) Development (if applicable)

Build custom LWCs to enhance UI functionality. Provide screenshots of components in action.



6. Lightning Pages

Responsive record pages for faster sales operation.

Phase 4: Data Migration, Testing & Security

1. Data Loading Process

Used Data Import Wizard to upload Customer, Product, and Inventory records.

2. Field History & Duplicate Management

Enabled tracking for Order Status, Stock changes, and applied duplicate prevention on customer records.

3. Profiles, Roles, Permission Sets & Sharing Rules

Ensured proper role hierarchy: Admin > Inventory Manager > Sales Rep.

4. Test Classes & Test Cases

Test Classes (if Apex created): Ensured 75% or above code coverage.

Test Cases Prepared For: Order creation

Low stock automation

Customer loyalty update

Approval workflows

Email alert automation

Phase 5: Deployment, Documentation & Maintenance

1. Deployment Strategy

Used Change Sets from Sandbox to Production. Validated before deployment.

2. System Maintenance & Monitoring

Regular monitoring of automation logs, field data accuracy, and user access. Scheduled review of reports and dashboards.

3. Documentation & Troubleshooting

Logged issues through Salesforce Setup → Debug Logs → Flow Error Logs → Permission review. Fixes documented.

Conclusion

The HandsMen Threads CRM successfully delivers an organized, automated, and scalable business solution that enhances operational efficiency and improves customer experience. By centralizing customer records, automating order and inventory processes, and generating meaningful insights through dashboards, the CRM supports growth and strengthens business strategy. With its flexible and user-friendly architecture, the system is capable of future enhancements such as chatbot support, online order integration, and AI-driven fashion recommendations.

The platform enhances operational efficiency, strengthens customer relationships, and supports future growth for the brand ultimately elevating the sophistication and service quality that defines HandsMen Threads.

Additional Points

- **Only the essential details** were included in the documentation, describing the required objects, flows, validation rules, automations, and Salesforce configurations — while avoiding step-by-step procedures.
- **Screen captures/screenshots** from Salesforce Setup and all relevant configurations should be included for every Salesforce feature implemented in the project.
- A brief explanation was provided for all important components, including **validation rules, approval processes, automation flows, page layouts, and custom objects** created for the CRM.
- A clear **Testing Approach** was mentioned, describing how test cases were prepared and executed for flows, reports, approval processes, and other system functionalities.
- **Future Enhancements** were identified, such as chatbot integration, advanced analytics, AI-driven suggestions, and upgraded loyalty features that can be implemented later as the business grows.

SCREENSHOTS

The screenshot shows the HandsMen Customers page. The navigation bar includes 'HandsMen Threads', 'HandsMen Customers' (selected), 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Dashboards', and 'More'. A 'Recently Viewed' section lists 4 items: 'Handmen Customer Name' (justine, james, John, joshua). Buttons for 'New', 'Import', 'Change Owner', and 'Assign Label' are at the top right. A search bar and filter icons are below. A Windows taskbar at the bottom shows the date and time.

The screenshot shows the HandsMen Orders page. The navigation bar is identical to the previous screen. A 'Recently Viewed' section lists 0 items. A decorative illustration of a building and clouds is displayed. A message 'Nothing to see here' is centered. An 'Activate Windows' notice is at the bottom right. The Windows taskbar at the bottom shows the date and time.

The screenshot shows the HandsMen Products page. The navigation bar is identical. A 'Recently Viewed' section lists 5 items: 'HandsMen Product Name' (laptop, wax, Bag, Lipstick, comb). A Windows taskbar at the bottom shows the date and time.

The screenshot shows the Inventory page. The navigation bar is identical. A 'Recently Viewed' section lists 5 items: 'Inventory Number' (I-0004, I-0001, I-0006, I-0002, I-0003). A Windows taskbar at the bottom shows the date and time.

A screenshot of a web browser displaying a Salesforce interface. The title bar shows the URL: orgfarm-4b35a09110-dev-ed.develop.lightning.force.com/lightning/o/Marketing_Campaign__c/list?filterId=00Qf00000000000. The page header includes navigation links for HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns (which is selected), Dashboards, and More. Below the header is a search bar and a toolbar with buttons for New, Import, Change Owner, and Assign Label. The main content area displays a list titled 'Recently Viewed' under 'Marketing Campaigns'. It shows one item: '1 item · Updated a few seconds ago · Marketing Campaign Number · MC - 0001'. At the bottom right of the page is a message: 'Activate Windows Go to Settings to activate Windows.'

A screenshot of a web browser displaying a Salesforce interface. The title bar shows the URL: orgfarm-4b35a09110-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=... The page header includes navigation links for HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Dashboards (which is selected), and More. Below the header is a search bar and a toolbar with buttons for New Dashboard and New Folder. The main content area displays a sidebar titled 'Dashboards' with a 'Recent' section containing 0 items. It includes categories for 'Created by Me', 'Private Dashboards', and 'All Dashboards'. To the right of the sidebar is a decorative illustration of a desert landscape with cacti and mountains. A message at the bottom right says: 'Recent dashboards appear here Go to All Dashboards to see what's available. View All Dashboards'. At the bottom right of the page is a message: 'Activate Windows Go to Settings to activate Windows.'

A screenshot of a web browser displaying the Salesforce Setup Home page. The title bar shows the URL: orgfarm-4b35a09110-dev-ed.develop.my.salesforce-setup.com/lightning/setup/SetupOneHome/home. The page header includes navigation links for Setup (which is selected), Home, and Object Manager. On the left is a sidebar with a search bar for 'user' and sections for Users, Datacom, Service, and Embedded Service. The main content area features a 'Welcome, John' message and a 'Manage and customize Salesforce from Setup. Browse suggestions, explore features, and more.' message. Below this is a section titled 'Achieve Popular Business Goals' with two cards: 'Connect with Sales Prospects and Customers' (3 Completed, 1 In Progress) and 'Track & Manage Customer Data' (2 Completed, 1 In Progress). At the bottom right of the page is a message: 'Activate Windows Go to Settings to activate Windows.'

