

## **HandsMenThreads: Elevating Men's Fashion with Salesforce**

### **Project Overview**

HandsMen Threads, an emerging brand in the fashion sector, is launching a Salesforce Customer Relationship Management (CRM) initiative aimed at upgrading its enterprise data handling and customer engagement processes. The project focuses on building a strong, Salesforce-native data structure that captures all key business records and their relationships, ensuring smooth and consistent information flow across sales, operations, inventory, and customer support. By implementing data accuracy measures directly at the user interface—such as structured fields, validation rules, and guided input controls—the system ensures dependable, precise, and meaningful data for operational reporting and long-term business planning.

### **Project Objective**

The main goal of this project is to develop and deploy a Salesforce-driven solution for HandsMen Threads that consolidates business information, maintains strict data accuracy at the user interface, and enhances customer engagement across the organization. The project emphasizes a solid data model and targeted automation for processes like order confirmation, loyalty program updates, stock alerts, and bulk order handling, enabling trustworthy reporting, informed decision-making, and smoother operations.

### **More specifically, the project aims to:**

- Automate important post-order and inventory processes including customer confirmation emails, loyalty adjustments, and low-stock notifications to minimize manual work and reduce mistakes.

- Uphold strong data quality through a structured data model and strict validation rules applied at the interface.
- Provide realtime visibility into inventory status, customer activity, and sales results for faster and more coordinated decision-making.
- Improve teamwork among sales, inventory, and marketing groups by unifying workflows and records inside Salesforce.
- Support scalable and personalized customer interactions through automated messaging and a dynamic loyalty system based on buying behavior.
- Apply essential Salesforce competencies such as data modeling, quality enforcement, Lightning App Builder, record-triggered flows, and Apex (both synchronous and asynchronous) for advanced and scheduled business needs.

### **Technology Description**

Salesforce is a cloud-based CRM platform designed to consolidate customer and business information across sales, service, marketing, and related areas. It delivers integrated tools for managing contacts, analyzing data, automating workflows, and enhancing team collaboration. For this project, Salesforce acts as the central system for organizing operational and customer data for HandsMen Threads, while automating processes like order management, loyalty assessments, and stock monitoring. The solution blends low-code tools (Lightning App Builder and flows) with coded enhancements (Apex and asynchronous processing) to support customized logic at scale.

### **Custom Objects**

These custom objects serve as structured databases within Salesforce, designed to capture and store information unique to HandsMen Threads.

- **HandsMen Customer:** Holds complete customer details, such as personal data, contact information, and loyalty status.
- **HandsMen Product:** Stores the product list, with details like name, description, price, and other essential merchandising information.
- **HandsMen Order:** Tracks each order placed by customers, linking the record to relevant customer and product entries, and capturing order date, quantities, and total value.
- **Inventory:** Monitors stock levels for every product, providing insight into quantities on hand and helping identify low-stock items.
- **Marketing Campaign:** Contains details about promotional initiatives, target groups, and campaign performance linked to customer responses.

## **Tabs**

Tabs serve as shortcuts to the main business modules set up within Salesforce. Each major object Customer, Order, Product, Inventory, and Campaign has its own tab, enabling team members to easily create, edit, and monitor records within the “HandsMen Threads” app.

## **Custom App**

A custom Lightning app named “HandsMen Threads” was built as the team’s central workspace. It consolidates all necessary tabs Customer, Order, Product, Inventory, Campaign, and Reports into one interface, promoting an organized and efficient daily workflow.

## **Profiles & Roles**

Profiles and roles regulate system permissions and data access to match job responsibilities.

- **Profiles:** Define user abilities—such as accessible objects, editable fields, and layout visibility. Custom profiles like “HandsMen Sales Profile” were tailored for various roles.
- **Roles:** Control which records users can see depending on the organizational hierarchy, allowing managers broader visibility and limiting reps to their assigned records.

## **Permission Sets**

Permission sets provide additional access without changing a user’s base profile. In this system, permissions were assigned based on job duties—Sales Managers have full customer and order access, Inventory Managers can modify stock and product information, and the Marketing Team can edit campaign data while only viewing customer records.

## **Validation Rules**

Validation rules act as controls to ensure that records meet required standards before being saved. They enforce proper formats, prevent impossible values (e.g., negative inventory), and ensure essential fields are completed.

## **Email Templates and Alerts**

Standard email templates and automated notifications help maintain consistent communication.

- HTML Order Confirmation email
- Text-based Low Stock Alert
- HTML Loyalty Program email

## **Flows**

- Email Notification Flow: Automatically sends a confirmation email.
- Stock Update Flow: Updates stock levels.
- Scheduled Loyalty Update Flow: Runs daily for loyalty updates.

## Apex

- Update Order Total
- Stock Deduction
- Loyalty Status Update

## Detailed Execution of Project Phases

### 1. Salesforce Developer Org Setup

A Salesforce Developer Edition org was created for setup and testing using <https://developer.salesforce.com/signup>.

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First name: Mark Ian ✓ Last name: Binabay ✓

Job title: Developer ✓ Work email: binabayianmark@gmail.com ✓

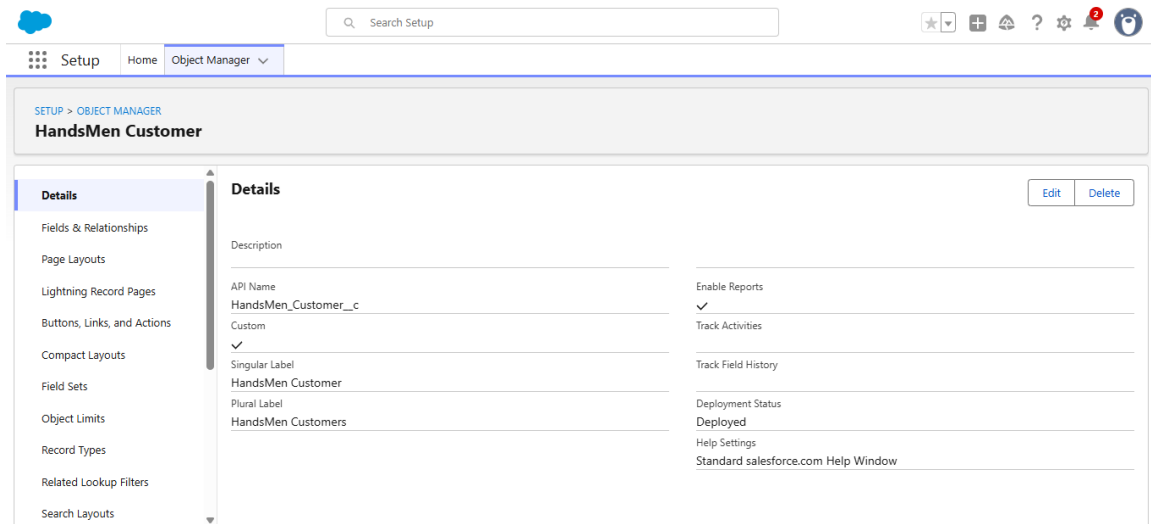
Company: Polytechnic University ✓ Country/Region: Philippines ✓

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.

### 2. Custom Object Creation

Created objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign.

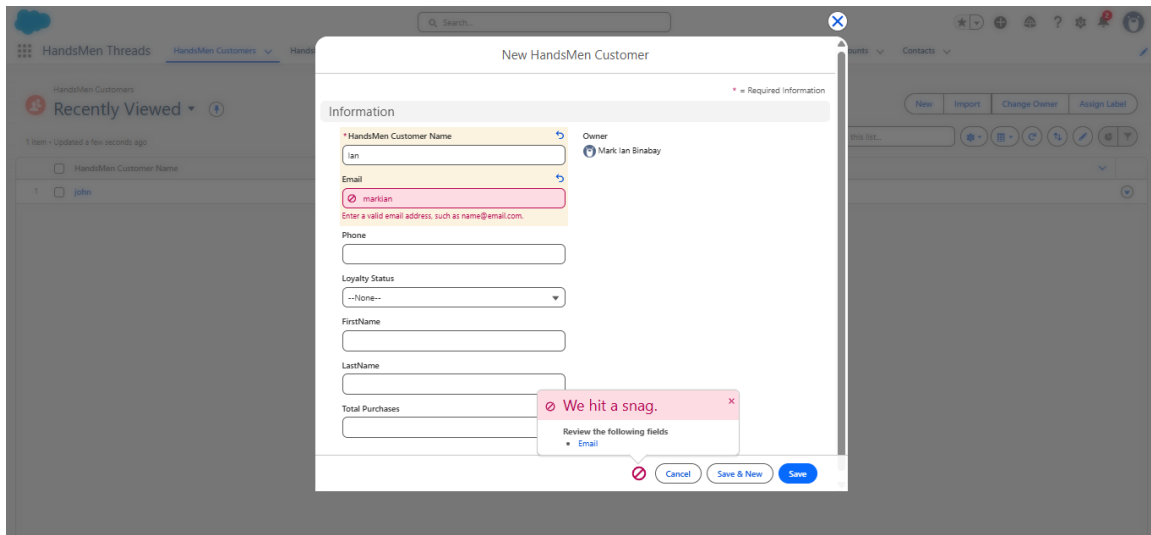


### 3. Custom Lightning App

“HandsMen Threads” app built to centralize tabs.

### 4. Validation Rules

Ensures email formatting, prevents negative stock, etc.



## 5. User Profiles & Roles

Created Sales and Inventory profiles and roles.

## 6. User Creation

Added users such as Niklaus and Kol Mikaelson.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area is titled 'Users' and shows the 'User Edit' form for 'Niklaus Mikaelson'. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. It also has dropdowns for Role (Sales), User License (Salesforce), and Profile (Platform 1). There are checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The form has 'Save', 'Save & New', and 'Cancel' buttons. A 'Required Information' icon is visible in the top right corner of the form.

## 7. Email Templates

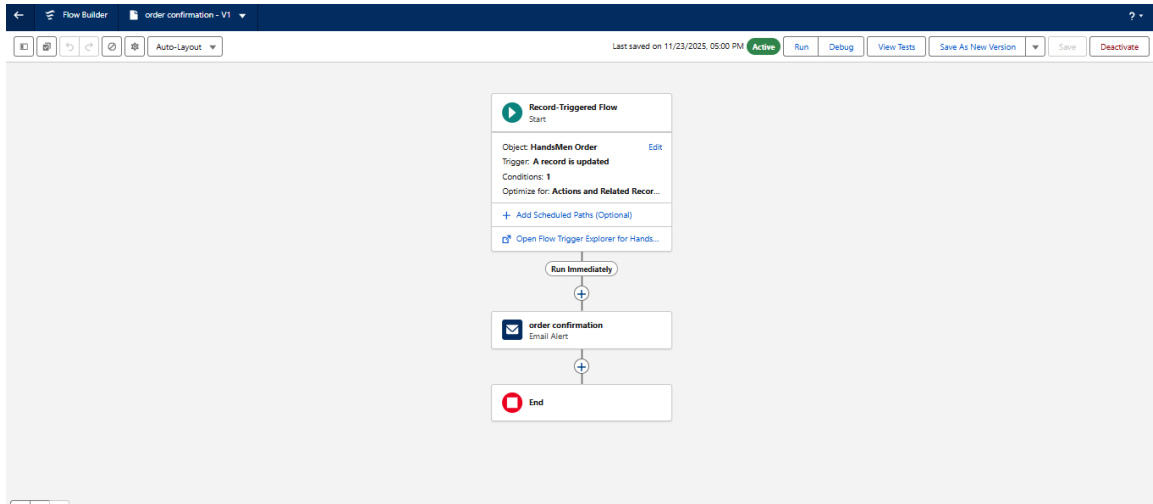
Order confirmations, stock alerts, and loyalty messages.

The screenshot shows the Salesforce Setup interface for the 'Classic Email Templates' section. The left sidebar contains a search bar with 'class' and a list of navigation items: Email, Classic Email Templates, Classic Letterheads, Custom Code, Apex Classes, Data Classification, Data Classification Download, Data Classification Settings, and Data Classification Upload. The main content area is titled 'Classic Email Templates' and shows the 'Email Template' form. The form includes a 'Subject' field with the text 'Your Order has been Confirmed!'. Below the subject is a large red rectangular area representing the email body. The email body text is: 'Dear {!HandsMen\_Order\_\_c.HandsMen\_Customer\_\_c}, Your order #(!HandsMen\_Order\_\_c.Name) has been confirmed! Thank you for shopping with us. Best Regards, Sales Team'. The form has 'Send Test and Verify Merge Fields', 'Edit Properties', 'Edit HTML Version', 'Edit Text Version', 'Delete', and 'Clone' buttons. The footer of the page shows the URL: 'orgfarm-8faac98fb-dev-ed.develop.my.salesforce-setup.com/lightning/.../home'.

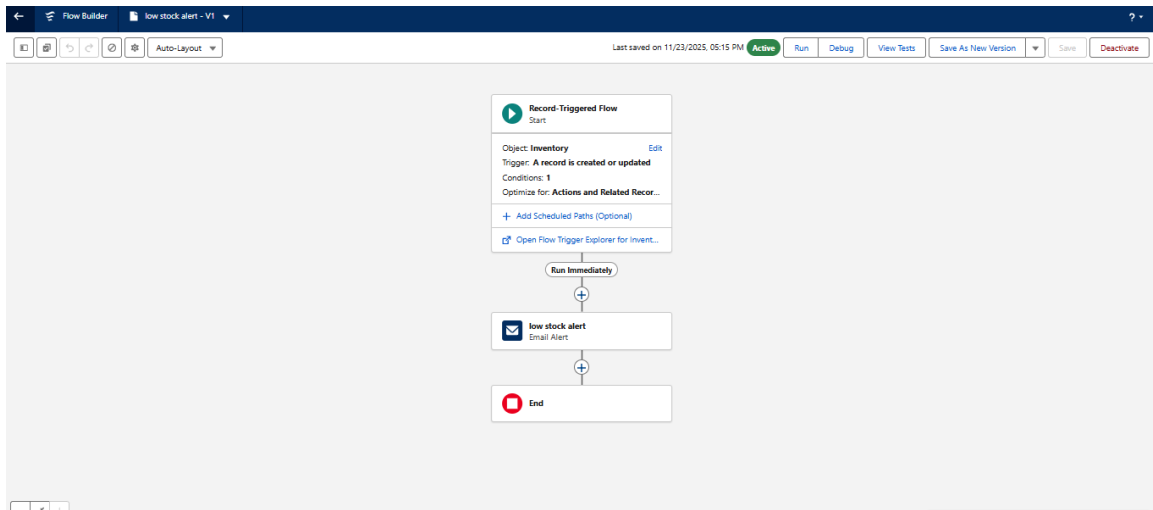
## 8. Flow Implementations

Record-triggered and scheduled flows for order, stock, and loyalty.

### a. Order Confirmation Flow

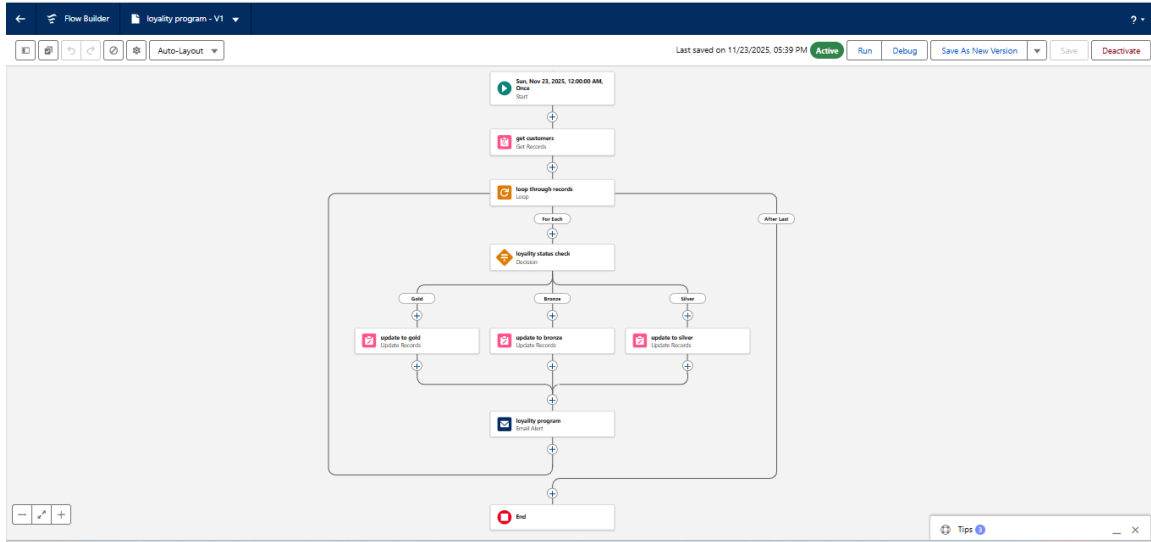


### b. Stock Alert Flow





### c. Scheduled Flow: Loyalty Update



## 9. Apex Triggers

OrderTriggerHandler, OrderTrigger, CustomerLoyaltyUpdateTrigger.

## Project Explanation with Real-World Example

### 1. Customer Registration

- A customer, Ian M, visits the store or website.
- A corresponding Customer record is created in Salesforce, capturing essential details such as his name, mobile number, and email address.
- A Validation Rule ensures data accuracy by verifying that the email provided follows the correct format (e.g., must contain “@gmail.com”).

### 2. Product Setup

- The admin adds products like skirts, T-shirts, etc., into the Product\_\_c object.

- Each product entry has a price, SKU, and other details.
- Inventory is also updated to store stock levels for each product, allowing real-time monitoring of item availability.

### **3. Order Placement**

- Ian decides to purchase 20 skirts, each priced at \$3.
- A new Order record is created in Salesforce that captures the details of his purchase.
- An Apex Trigger automatically calculates the total amount, ensuring consistent and error-free computation.

### **4. Inventory Update**

Once the order is submitted:

- Apex trigger on Inventory reduces skirts by 20.
- Validation Rule ensures stock never goes below 0.

### **5. Loyalty Program**

- Ian currently has a total purchase amount of 500.
- A trigger on the Customer object evaluates each customer's total purchase value.

Loyalty Status Criteria:

- Below 500 → Bronze
- 501-1000 → Silver
- Above 1000 → Gold

Based on these criteria, Ian qualifies as a Bronze member.

## 6. Email Notifications

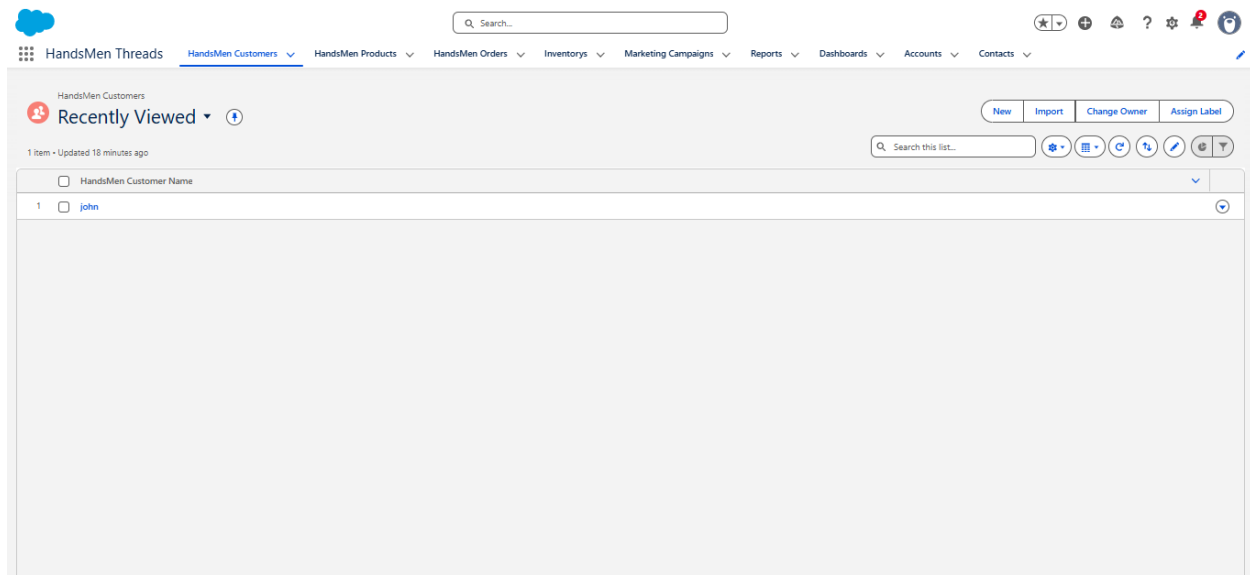
- When a new order is placed or when a customer's loyalty status is updated, a Flow combined with an Email Alert is triggered.
- Ian receives an email notification similar to:  
“Thanks for your purchase! Your loyalty status is now Bronze.”

## 7. User and Roles

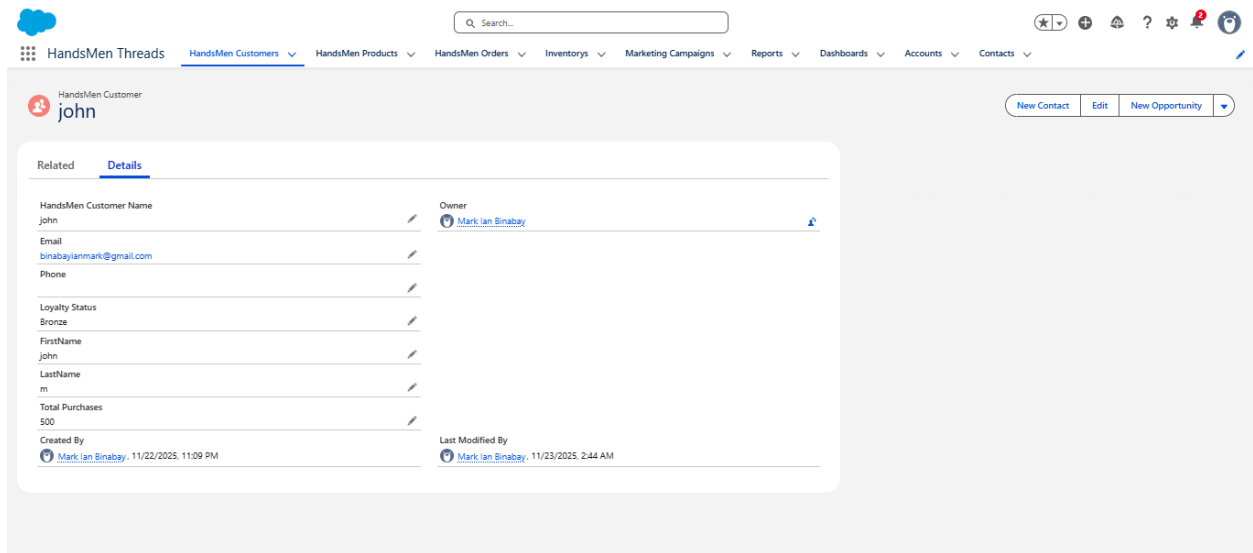
Salesforce users representing store staff were created and assigned the appropriate roles and profiles:

- **Niklaus Mikaelson** – Sales Role (assigned with the Platform 1 Profile)
- **Kol Mikaelson** – Inventory Role (assigned with the Platform 1 Profile)

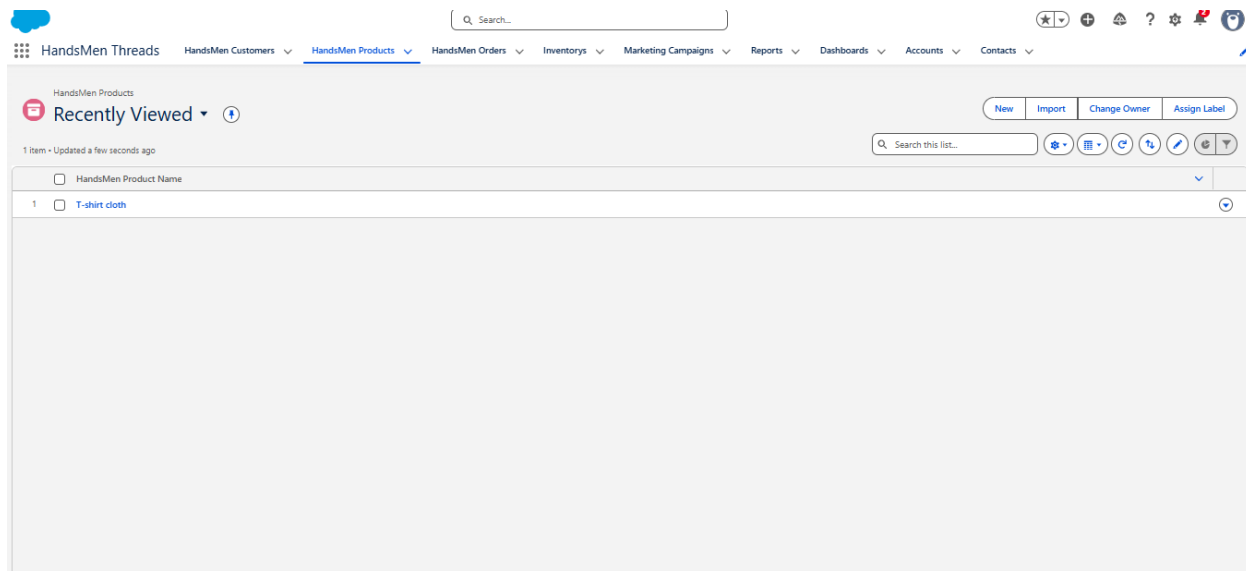
## Screenshots



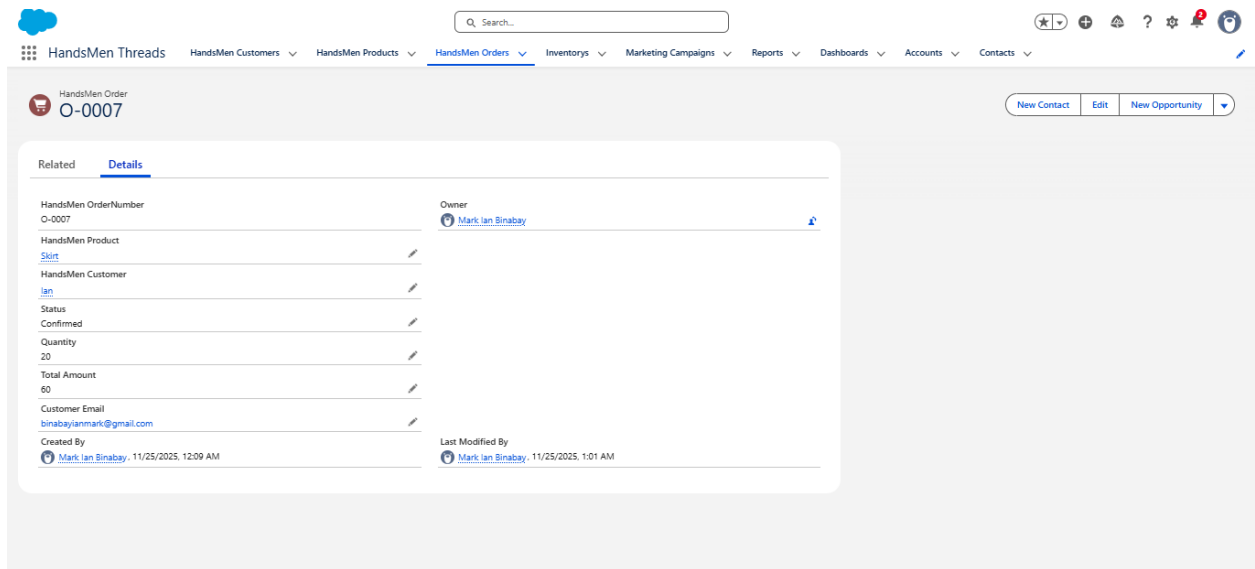
**Fig: Custom App for HandsMen Threads**



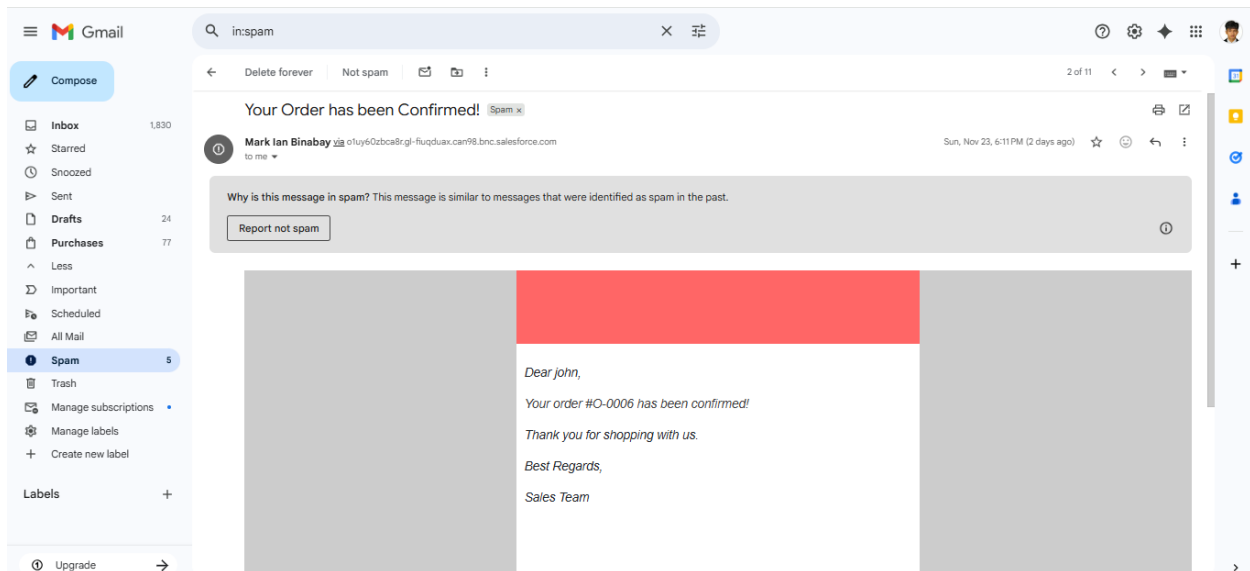
**Fig: Customer Creation in HandsMen Threads**



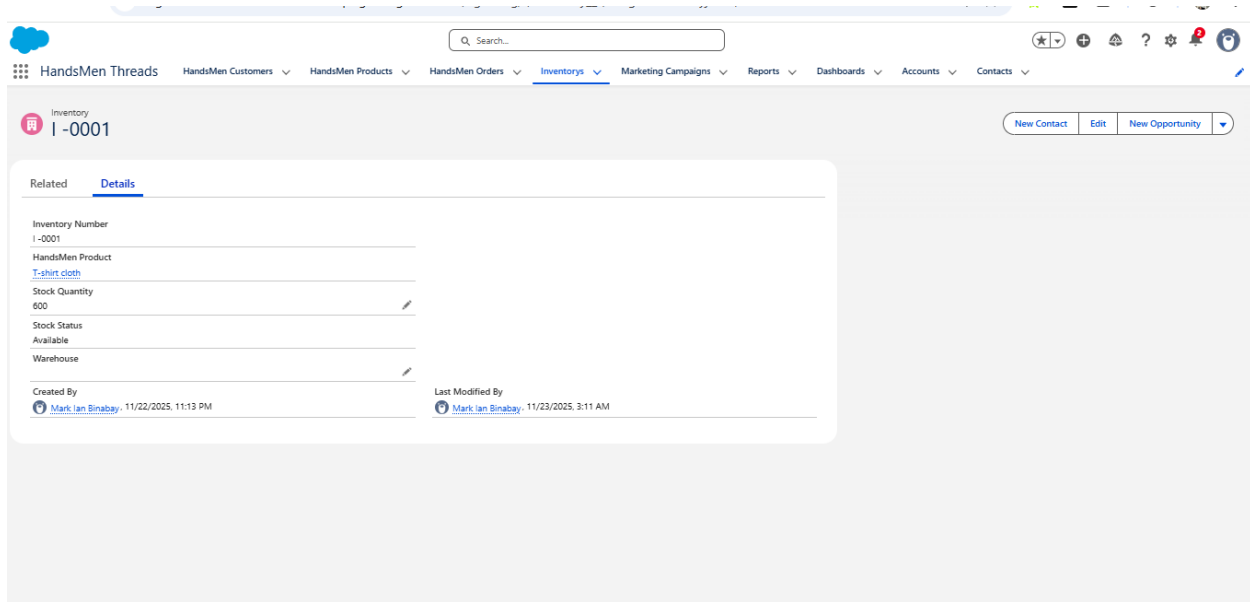
**Fig: Products in HandsMen Threads**



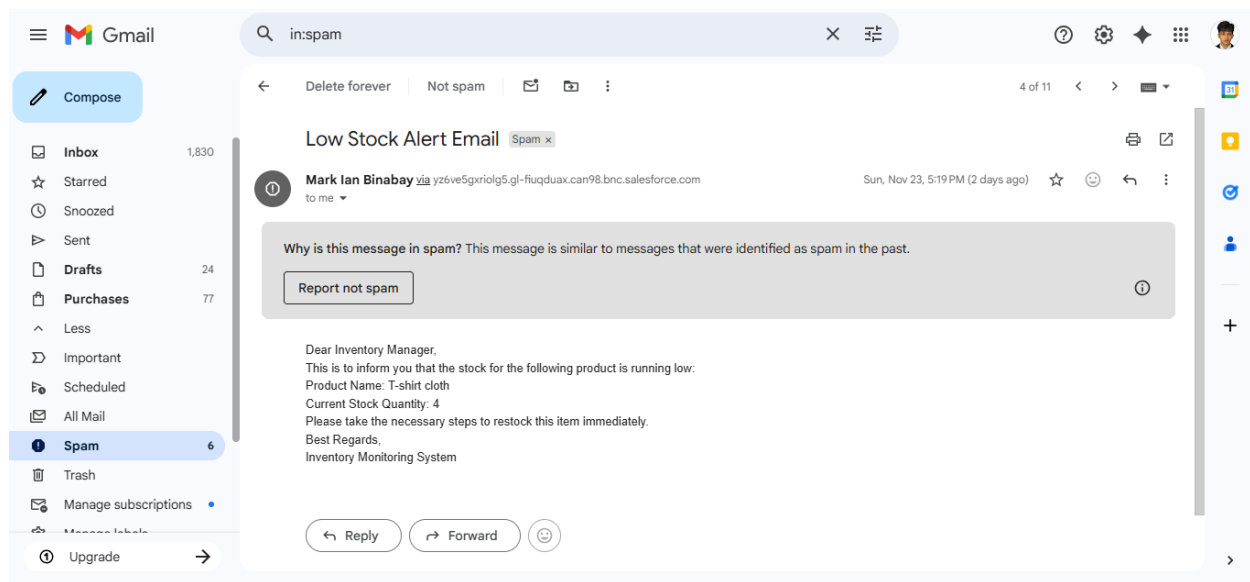
**Fig: Order Confirmation**



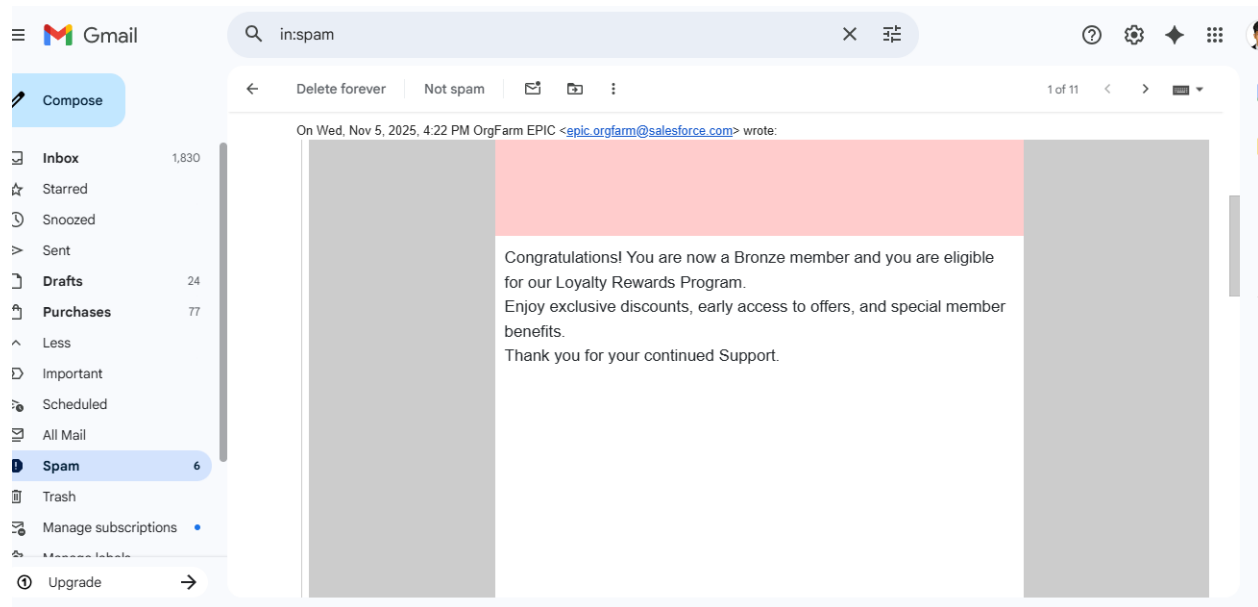
**Fig: Order Confirmation Email**



**Fig: Inventory Creation**



**Fig: Low Stock Alert Email**



**Fig: Loyalty Program Email**

## Conclusion

The Salesforce CRM implementation provides HandsMen Threads with a unified system for managing customers, sales, inventory, and marketing. Automation reduces manual work and errors while providing realtime insights, supporting growth and customer satisfaction.

## Future Scope

- Customer portal
- Staff mobile app
- Advanced dashboards
- AI recommendations
- Messaging integrations
- Data Cloud customer profiles
- AI stylist agents
- Omnichannel ecommerce integration.