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

Project Overview

HandsMen Threads is a Salesforce CRM project designed to enhance efficiency in men's fashion retail and tailoring operations. The platform addresses the key business problems of manual order tracking, inconsistent inventory management, and lack of customer engagement visibility. By leveraging Salesforce tools such as Custom Objects, Flows, Validation Rules, and Apex Triggers, the system automates core processes, enabling real-time updates across sales, inventory,

And marketing departments.

Objective

The primary objective of the HandsMen Threads CRM is to streamline daily business operations and improve customer experience through data-driven automation. Key goals include managing customers, orders, and inventory efficiently, ensuring accurate record keeping, enhancing personalized customer communication, and automating repetitive business processes to reduce manual effort and improve productivity.

Phase 1: Requirement Analysis & Planning

The business faced challenges in maintaining accurate stock levels, managing customer orders manually, and tracking loyalty program updates. The Salesforce CRM system was designed to solve these issues by integrating automation and centralizing business data.

Understanding Business Requirements:

- Automate customer order tracking and inventory updates in real time.
- Implement a loyalty program to increase customer retention.
- Provide email alerts for order confirmations and low-stock notifications.
- Maintain accurate data entry using validation rules.

Defining Project Scope:

The scope includes customer management, order and inventory automation, email notifications, and loyalty program integration. The system excludes payment gateway integration and advanced analytics (planned as future enhancements).

Stakeholder Mapping:

• Business Owner – Oversees project objectives and business alignment.
• Sales Manager – Manages customer orders and communication.
• Inventory Manager – Monitors stock levels and restocking.
• Developer / Administrator – Configures Salesforce and maintains automation.

Execution Roadmap:

1. System setup in Salesforce Developer Org.
2. Custom Object creation and relationships.
3. Validation rules and automation flows.
4. Apex trigger development.
5. Testing, documentation, and deployment.

Phase 2: Salesforce Development – Backend & Configurations

The backend was built in Salesforce using Custom Objects, Validation Rules, Flows, and Apex Triggers. A Developer Org was created, and five custom objects—Customer, Order, Product, Inventory, and Campaign—were configured.

- Validation Rules: Ensured correct email format and positive order amounts.
- Profiles & Roles: Configured for Sales, Inventory, and Marketing teams.
- Flows: Automated order confirmation, stock alerts, and loyalty updates.
- Apex Triggers: Calculated total amounts and adjusted inventory automatically.

Phase 3: UI/UX Development & Customization

The user interface was designed using the Salesforce Lightning App Builder. A custom Lightning App named “HandsMen Threads” was created, integrating relevant tabs for quick access to customers, orders, inventory, and campaigns.

Page layouts and dynamic forms were customized for each object, allowing users to manage customer data, view real-time inventory, and process orders efficiently. Reports and dashboards were planned for management review and are included in the future enhancement roadmap.

Phase 4: Data Migration, Testing & Security

Data migration was simulated using the Data Import Wizard to load customer, product, and inventory data. Validation rules ensured data accuracy during the import process.

Testing:

Each Salesforce feature was tested with real-world scenarios:

- Email Validation – prevented invalid entries.
- Order Confirmation Flow – triggered automated emails.
- Stock Alert Flow – sent notifications for low inventory.
- Apex Triggers – ensured accurate total calculation and stock reduction.

Test results were verified with screenshots for both input and output outcomes.

Security:

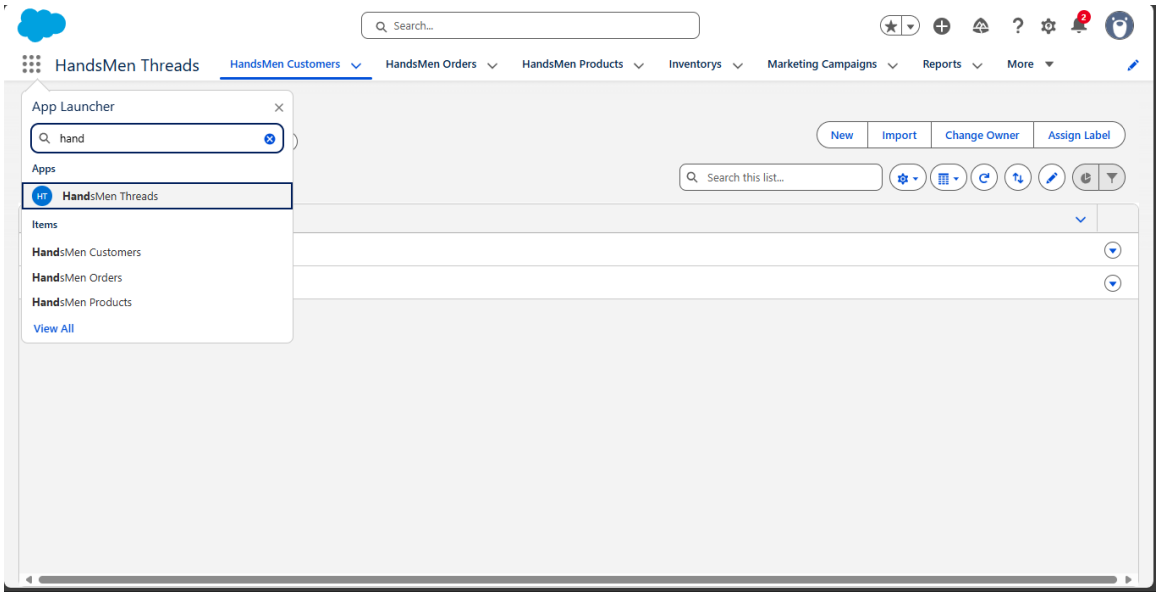
Profiles, Roles, and Permission Sets were implemented to control user access. Field History

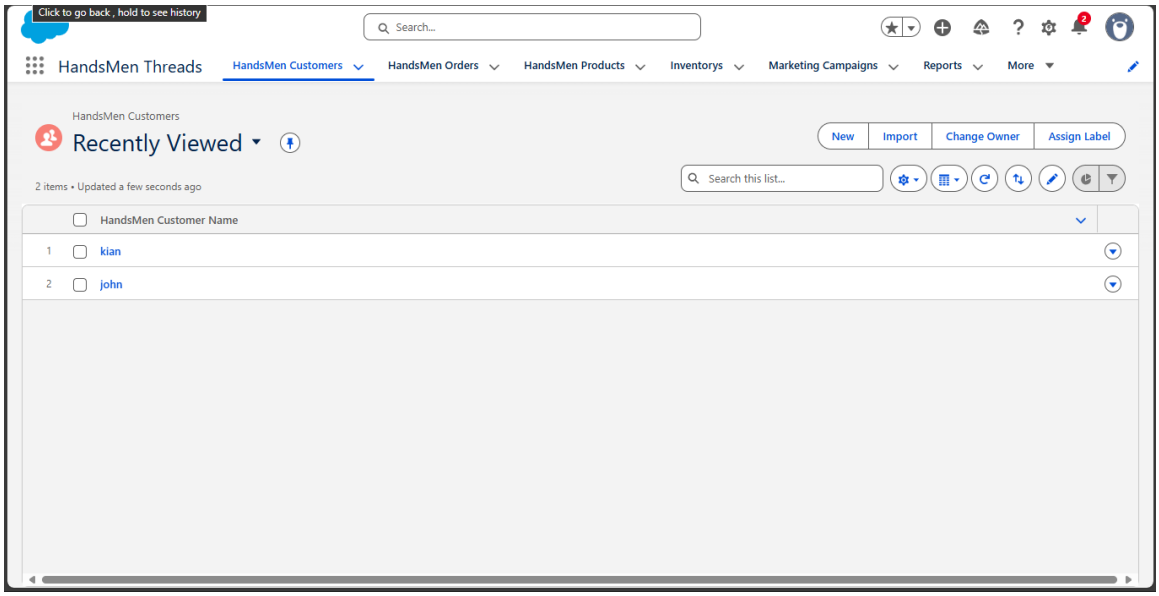
Tracking and Sharing Rules ensured data transparency and audit compliance.

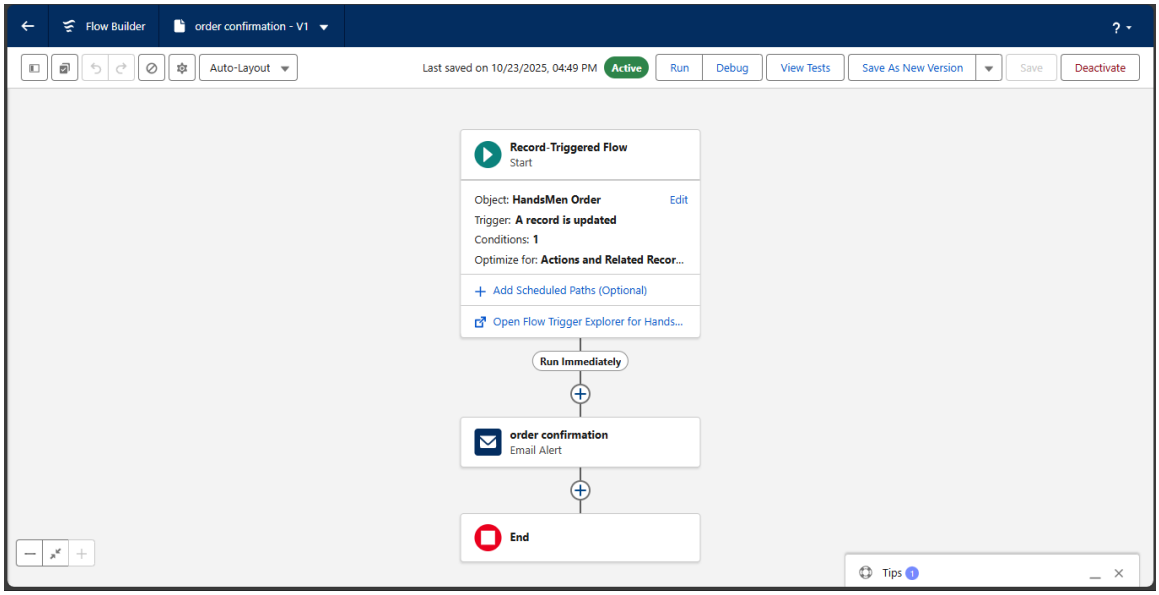
Phase 5: Deployment, Documentation & Maintenance

The deployment was executed using Salesforce Change Sets for transferring components from the development to the production environment. A maintenance plan was designed to monitor automation errors, user issues, and system updates. The documentation serves as a reference for future developers and administrators. Troubleshooting steps include verifying flow execution logs, Apex trigger debug logs, and email alert configurations.

Documentation:



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order confirmation - V1
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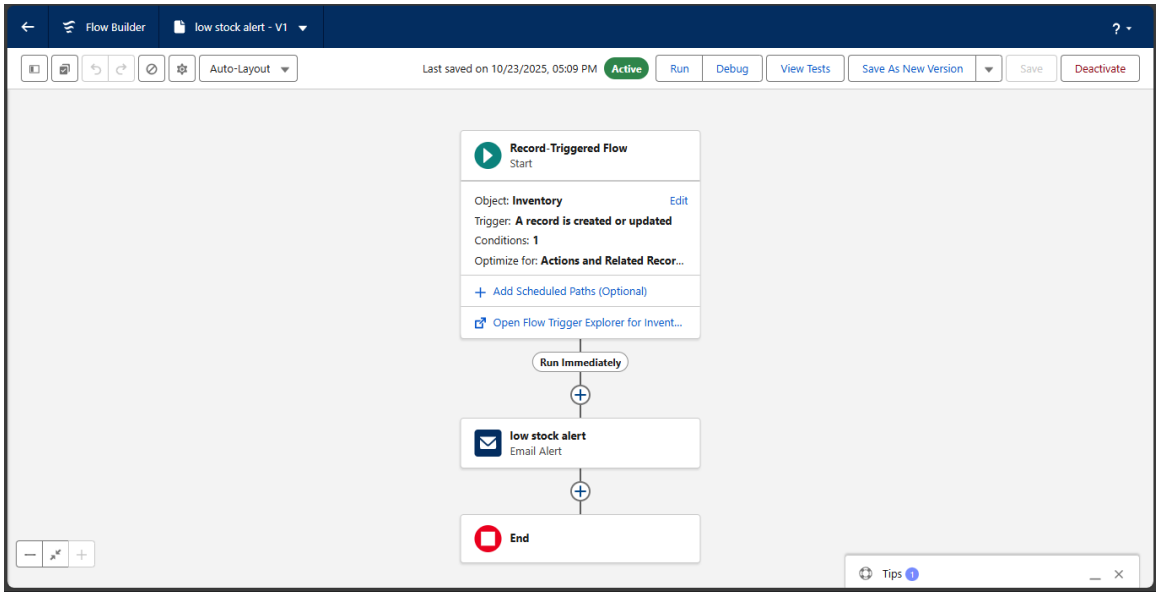
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Object: HandsMen Order
Edit
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Hands...
Run Immediately
order confirmation
Email Alert
End
Tips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low stock alert - V1
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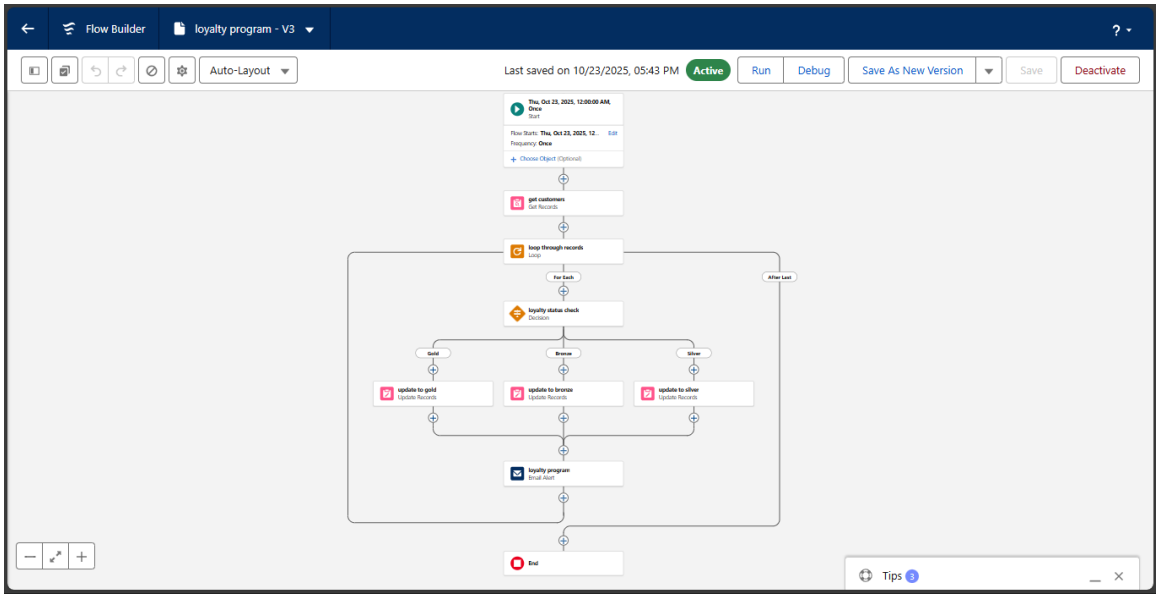
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Object: Inventory
Edit
Trigger: A record is created or updated
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Invent...
Run Immediately
low stock alert
Email Alert
End
Tips


Flow Builder
loyalty program - V3
Auto-Layout
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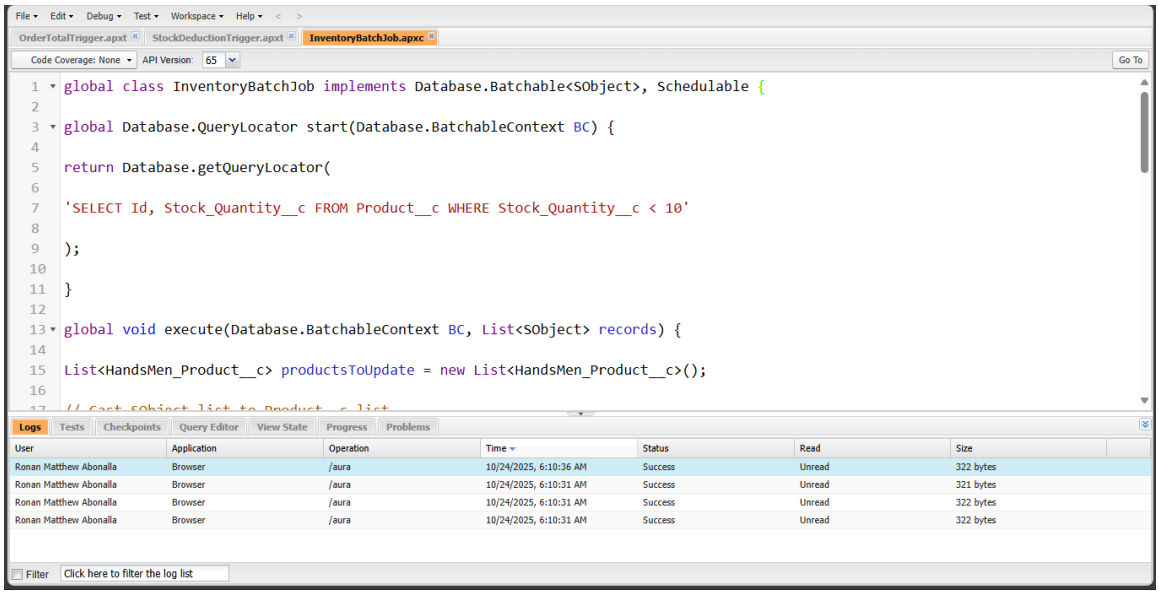
Active
Run
Debug
Save As New Version
Save
Deactivate
get customers
loop through records
loyalty status check
Gold
Bronze
Silver
update to gold
update to bronze
update to silver
loyalty program
End
Tips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Edit
Debug
Test
Workspace
Help
OrderTotalTrigger.apxt
StockDeductionTrigger.apxt
InventoryBatchJob.apxc
Code Coverage: None
API Version: 65
Go To
global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
global Database.QueryLocator start(Database.BatchableContext BC) {
return Database.getQueryLocator(
'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
);
}
global void execute(Database.BatchableContext BC, List<SObject> records) {
List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Ronan Matthew Abonalla
Browser
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Unread
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10/24/2025, 6:10:31 AM
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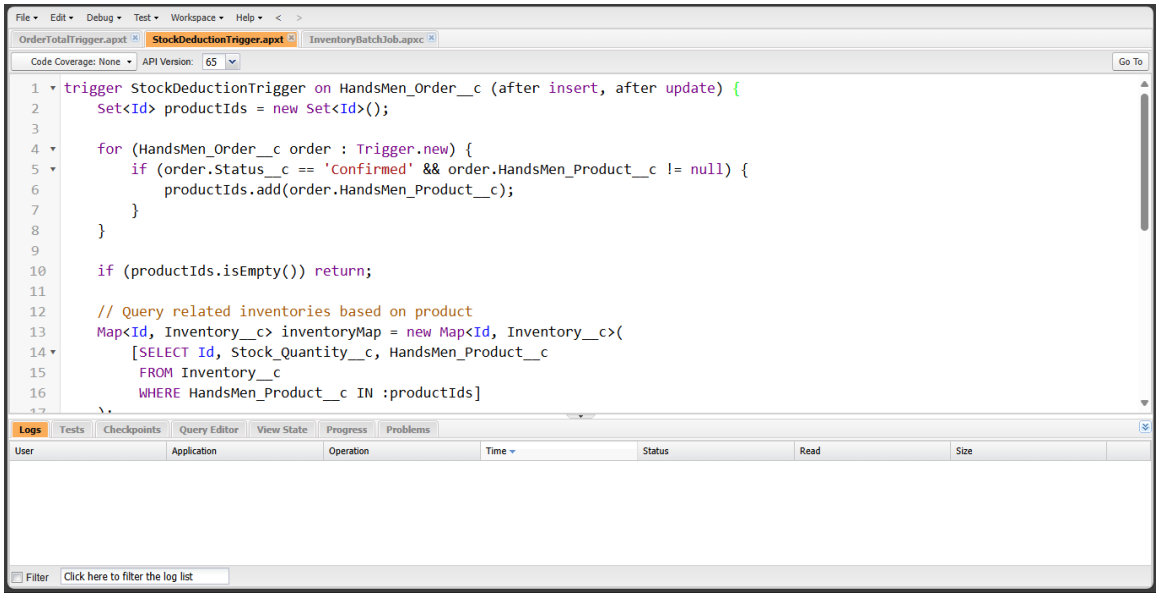
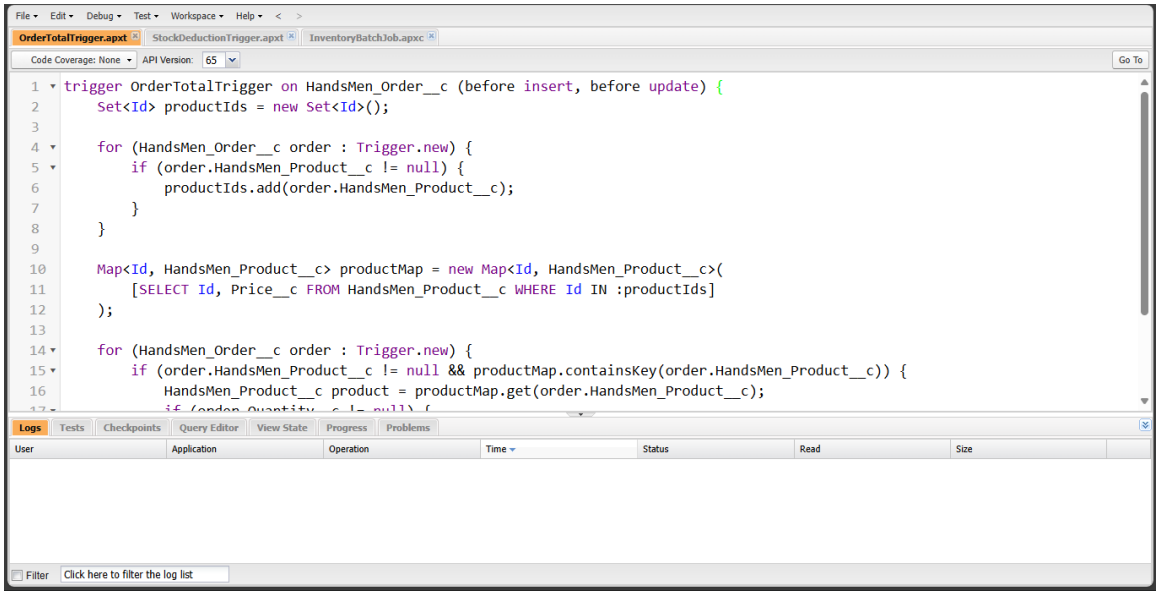
Click here to filter the log list


File Edit Debug Test Workspace Help
OrderTotalTrigger.apxt
StockDeductionTrigger.apxt
InventoryBatchJob.apxc
Code Coverage: None
API Version: 65
Go To
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
Set<Id> productIds = new Set<Id>();
for (HandsMen_Order__c order : Trigger.new) {
if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
productIds.add(order.HandsMen_Product__c);
}
}
if (productIds.isEmpty()) return;
// Query related inventories based on product
Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
[SELECT Id, Stock_Quantity__c, HandsMen_Product__c
FROM Inventory__c
WHERE HandsMen_Product__c IN :productIds]
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Filter
Click here to filter the log list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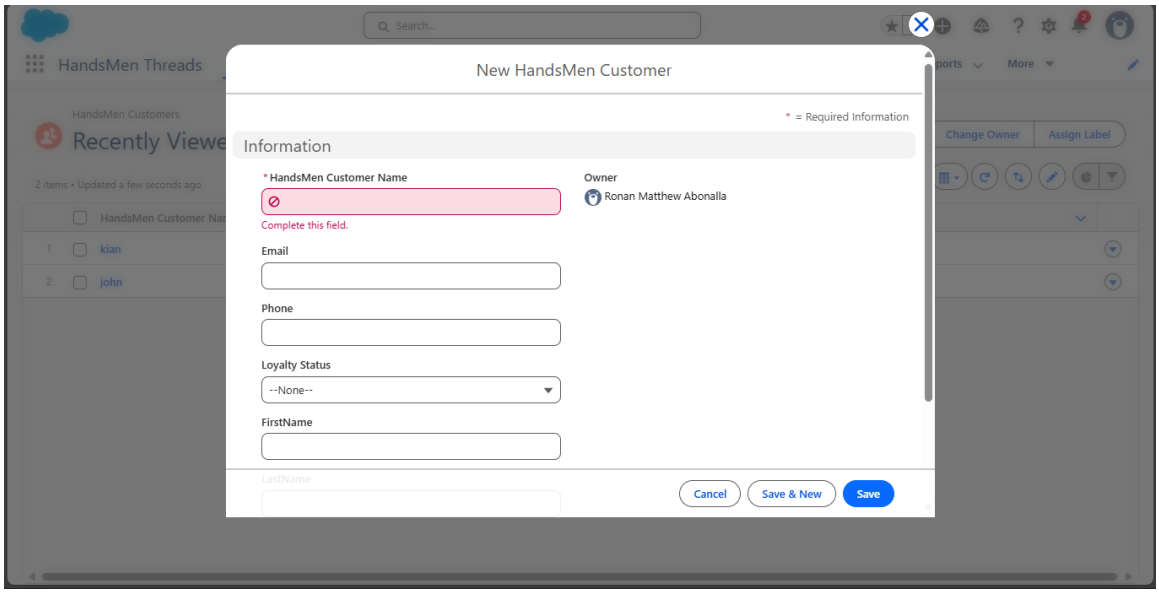
Set<Id> productIds = new Set<Id>();
for (HandsMen_Order__c order : Trigger.new) {
if (order.HandsMen_Product__c != null) {
productIds.add(order.HandsMen_Product__c);
}
}
Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
[SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id 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);
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Filter
Click here to filter the log list


HandsMen Threads
Search...
New HandsMen Customer
* = Required Information
Information
* HandsMen Customer Name
Complete this field.
Email
Phone
Loyalty Status
--None--
FirstName
LastName
Owner
Ronan Matthew Abonalla
Cancel
Save & New
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Recently Viewe
2 items • Updated a few seconds ago
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Change Owner
Assign Label
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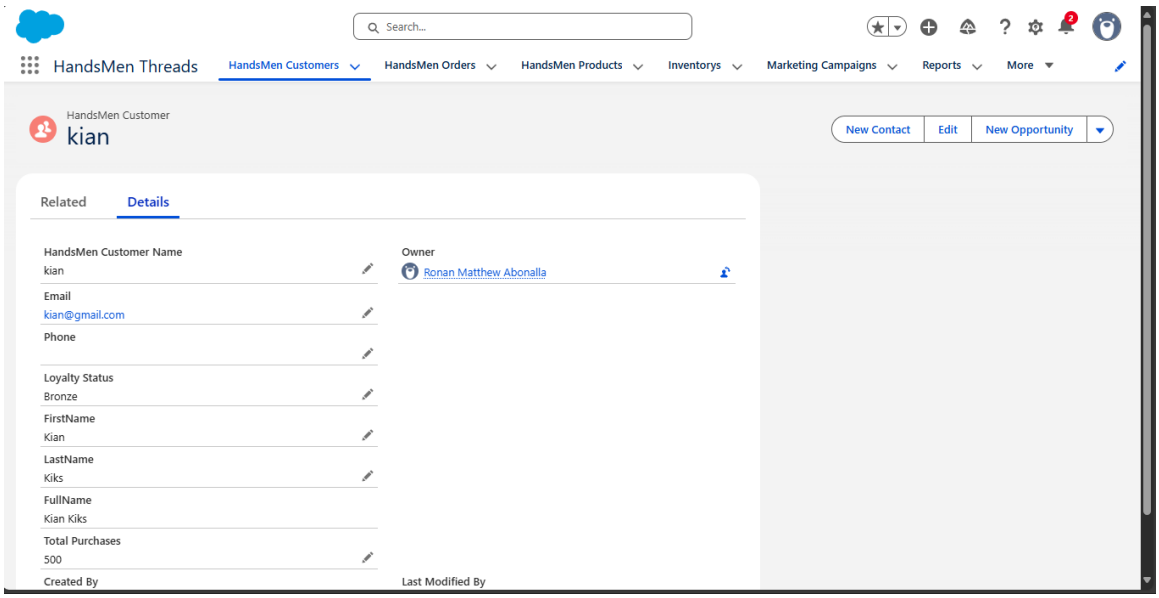
Search...
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HandsMen Customers
HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
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kian
New Contact
Edit
New Opportunity
Related
Details
HandsMen Customer Name
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Email
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Phone
Loyalty Status
Bronze
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LastName
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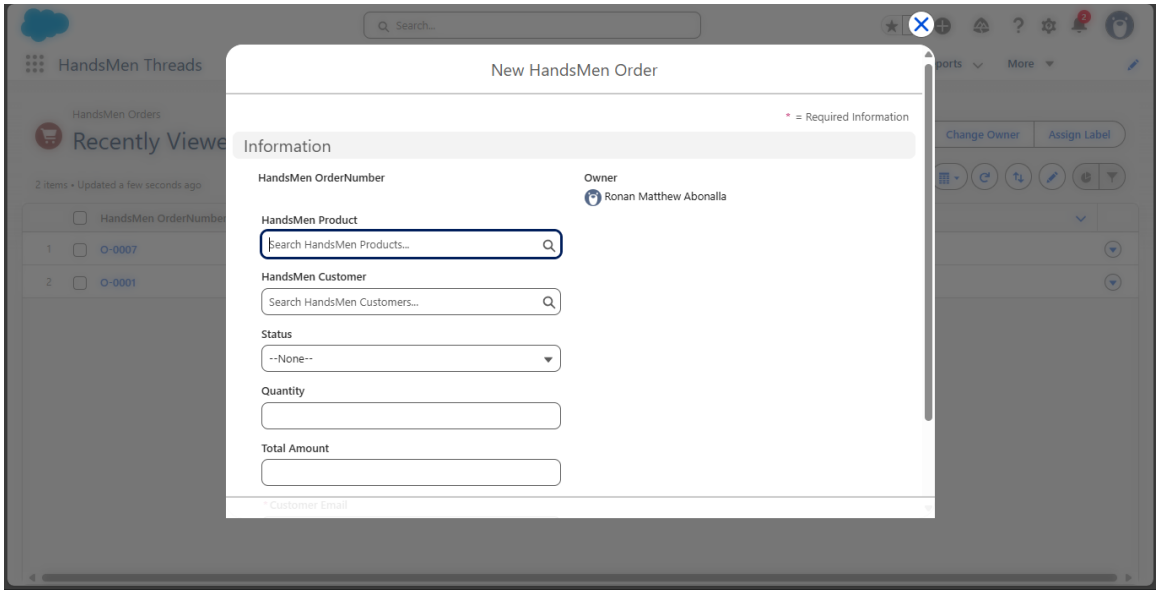
Created By
Owner
Ronan Matthew Abonalla
Last Modified By


HandsMen Threads
New HandsMen Order
* = Required Information
Information
HandsMen OrderNumber
Owner
Ronan Matthew Abonalla
HandsMen Product
Search HandsMen Products...
HandsMen Customer
Search HandsMen Customers...
Status
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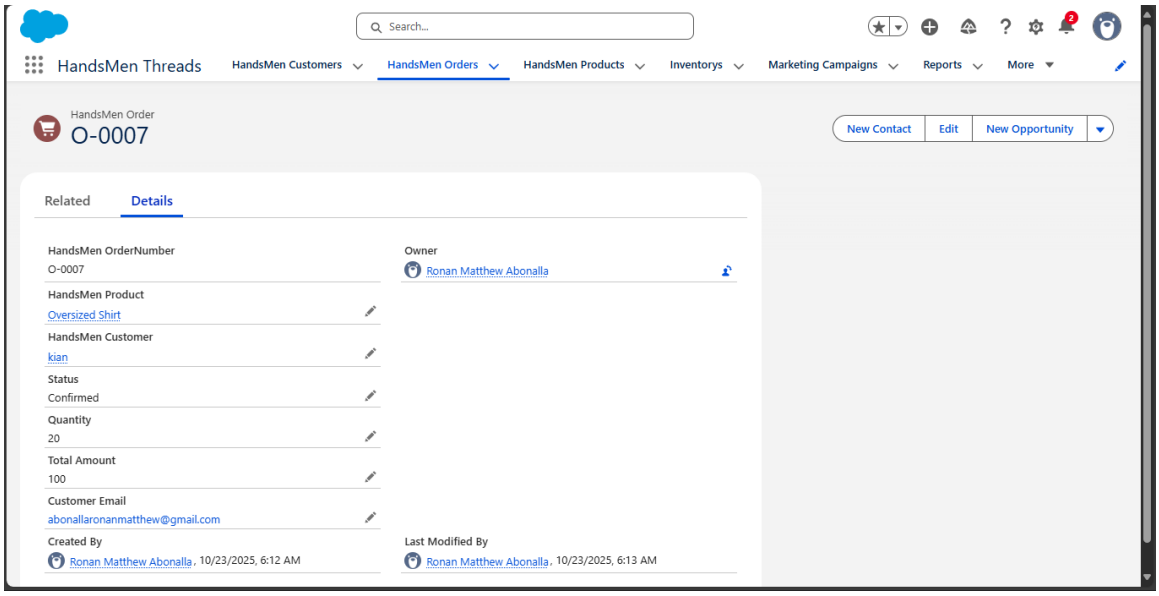
Quantity
Total Amount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HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
Reports
More
HandsMen Order
O-0007
New Contact
Edit
New Opportunity
Related
Details
HandsMen OrderNumber
O-0007
Owner
Ronan Matthew Abonalla
HandsMen Product
Oversized Shirt
HandsMen Customer
kian
Status
Confirmed
Quantity
20
Total Amount
100
Customer Email
abonallaronanmatthew@gmail.com
Created By
Ronan Matthew Abonalla, 10/23/2025, 6:12 AM
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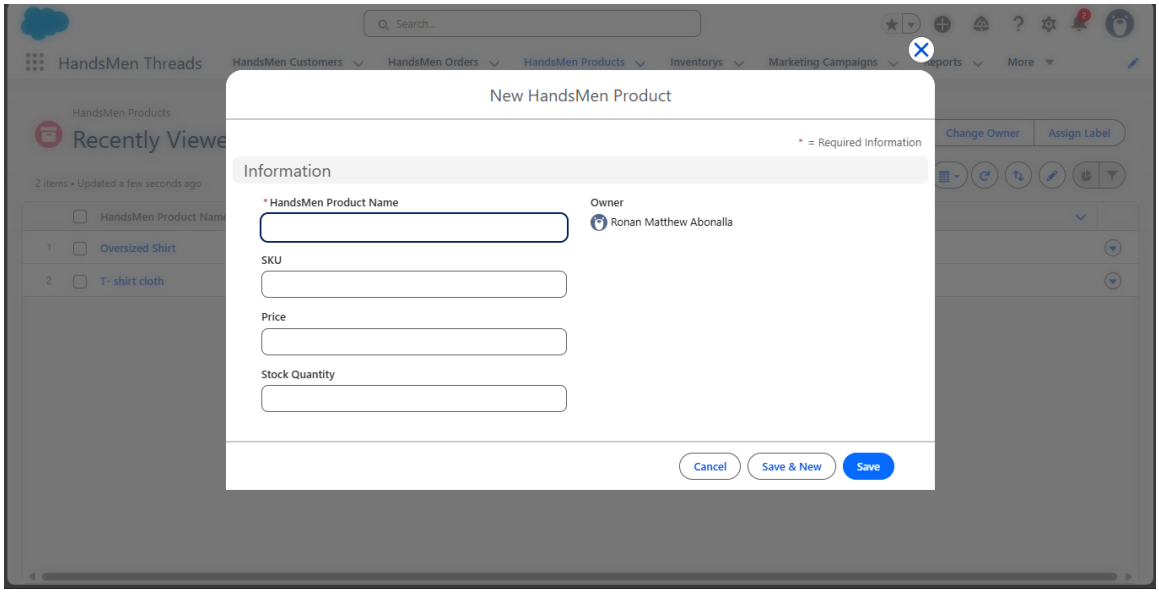
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Marketing Campaigns
Reports
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New HandsMen Product
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Information
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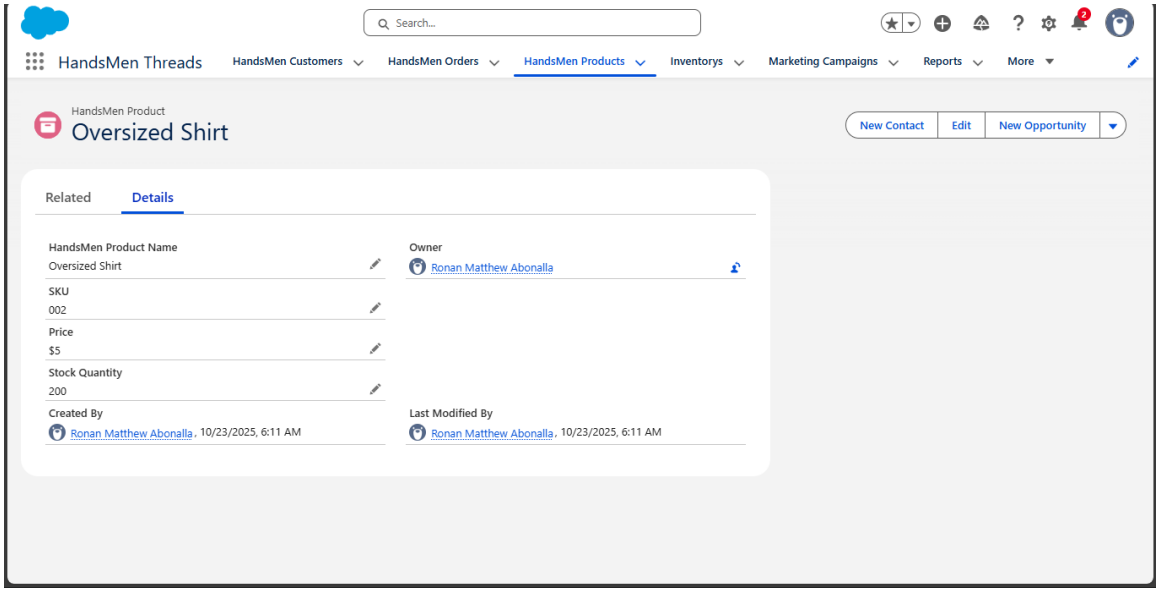
SKU
Price
Stock Quantity
Cancel
Save & New
Save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Reports
More
HandsMen Product
Oversized Shirt
New Contact
Edit
New Opportunity
Related
Details
HandsMen Product Name
Oversized Shirt
Owner
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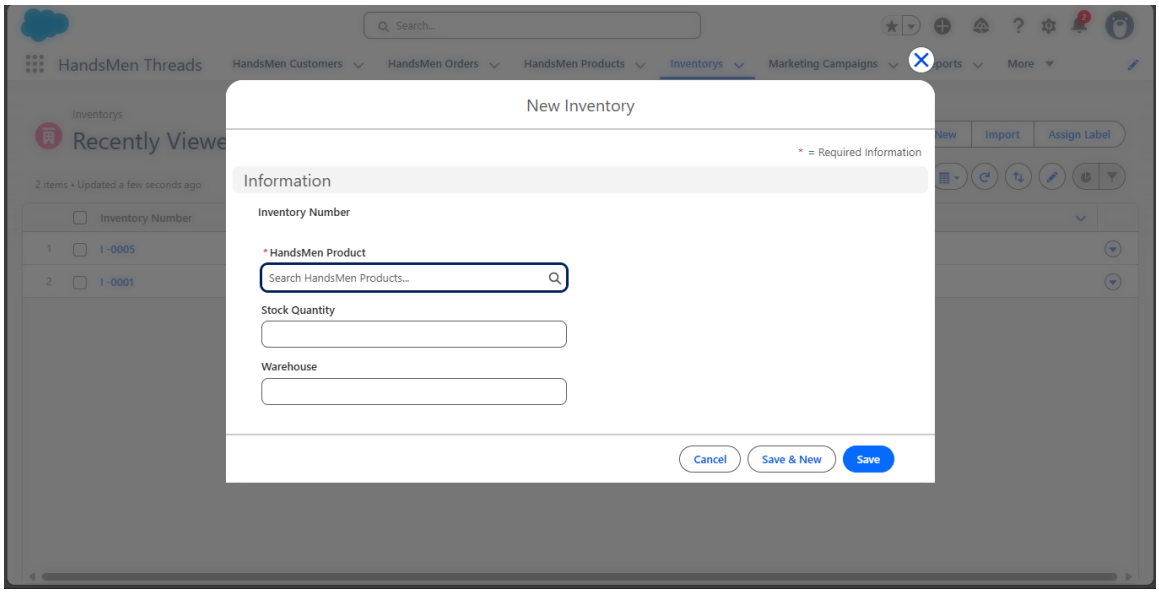
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HandsMen Orders
HandsMen Products
Inventorys
Marketing Campaigns
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New Inventory
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Inventory Number
* HandsMen Product
Search HandsMen Products...
Stock Quantity
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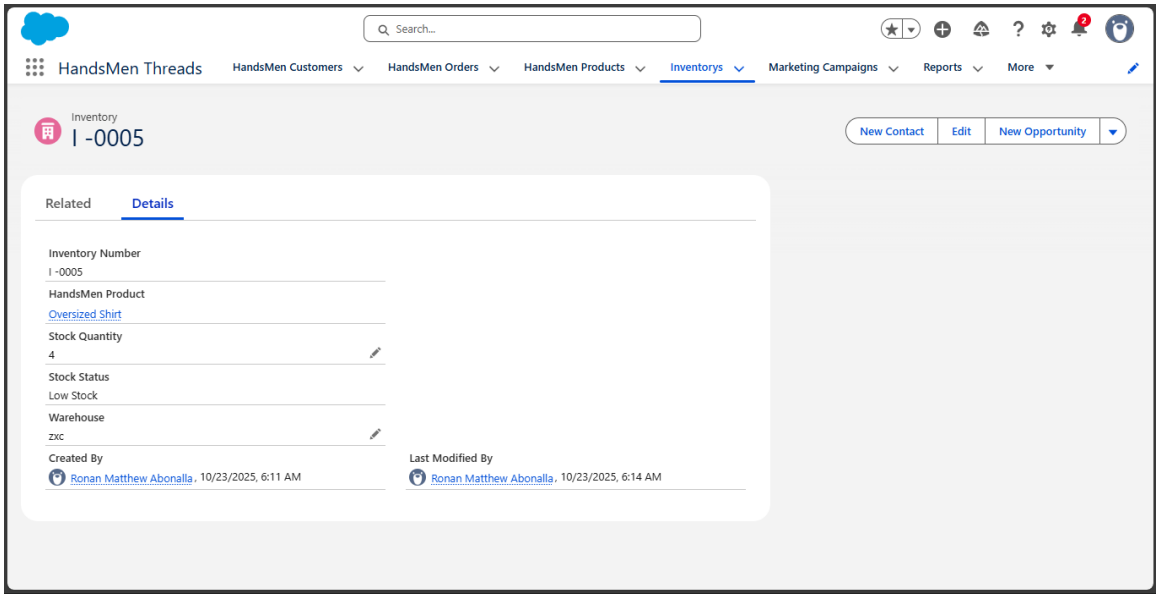
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Inventory Number
I -0005
HandsMen Product
Oversized Shirt
Stock Quantity
4
Stock Status
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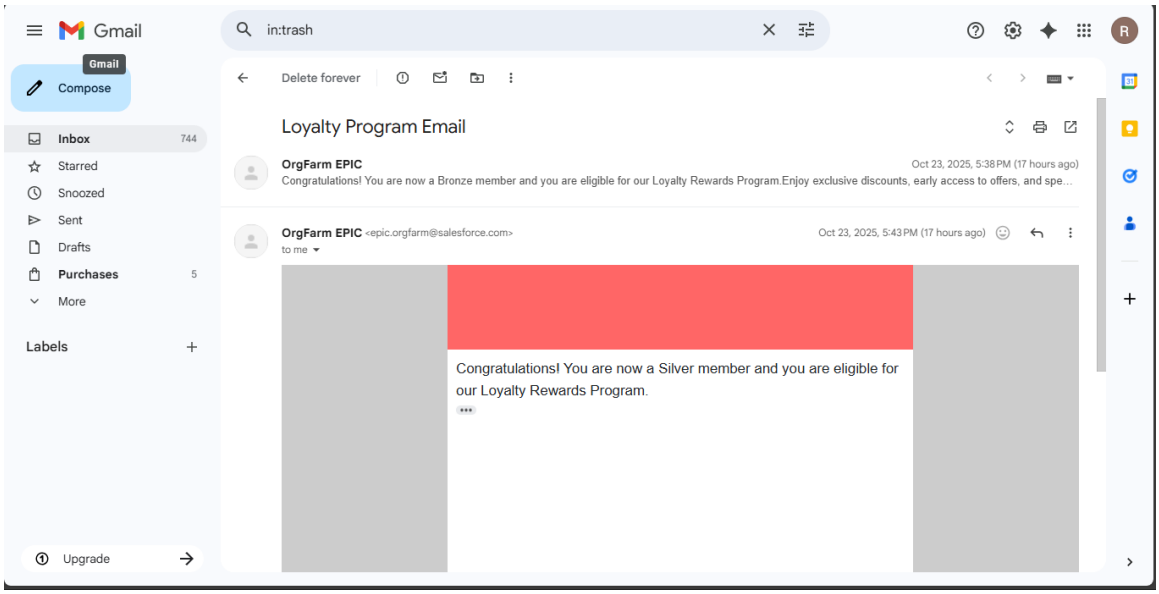
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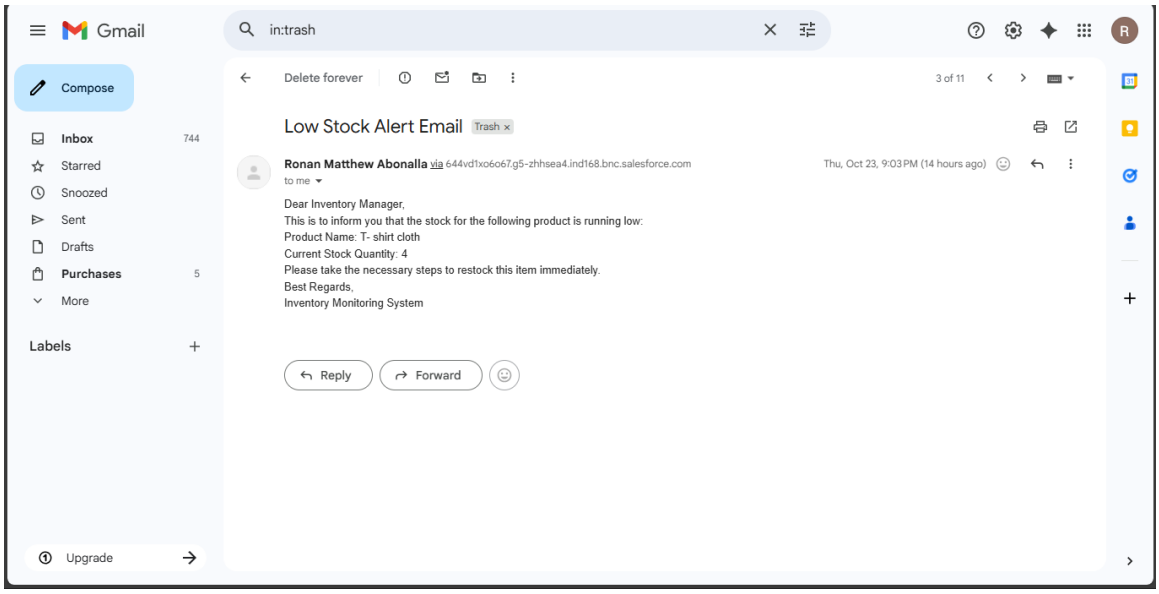
Snoozed
Sent
Drafts
Purchases 5
More
Labels
Upgrade
Delete forever
Loyalty Program Email
OrgFarm EPIC
Oct 23, 2025, 5:38 PM (17 hours ago)
Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.Enjoy exclusive discounts, early access to offers, and spe...
OrgFarm EPIC <epic.orgfarm@salesforce.com>
Oct 23, 2025, 5:43 PM (17 hours ago)
to me
Congratulations! You are now a Silver member and you are eligible for our Loyalty Rewards Program.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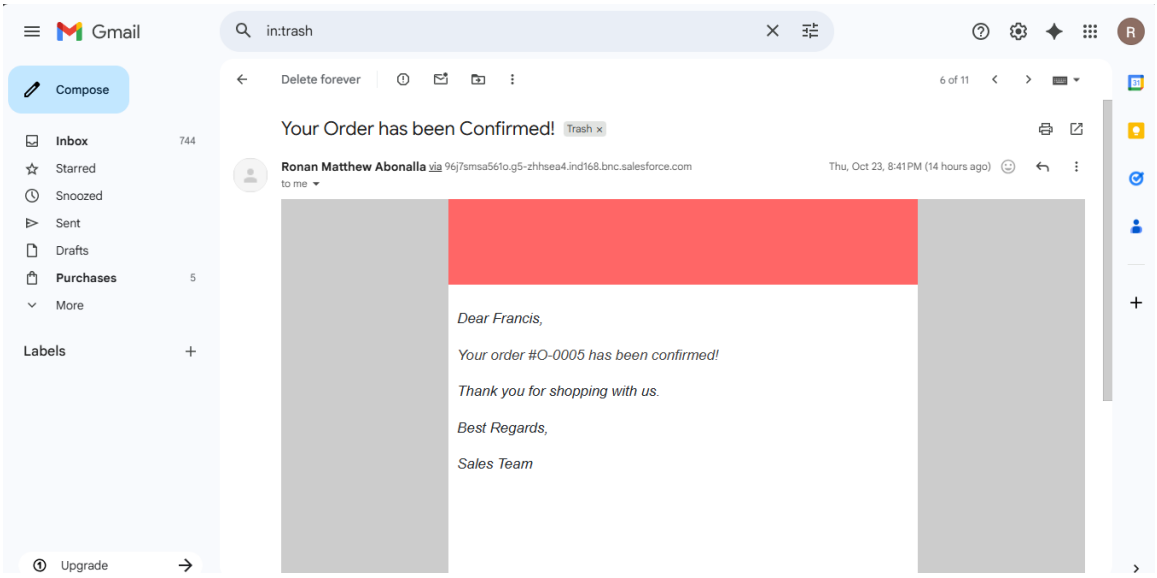
Inbox 744
Starred
Snoozed
Sent
Drafts
Purchases 5
More
Labels
Upgrade
Delete forever
3 of 11
Low Stock Alert Email
Trash
Ronan Matthew Abonalla via 644vd1xo6o67.g5-zhhsea4.ind168.bnc.salesforce.com
Thu, Oct 23, 9:03 PM (14 hours ago)
to me
Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: T- shirt cloth
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System
Reply
Forward



Conclusion

The HandsMen Threads Salesforce CRM successfully streamlined customer management, order processing, inventory tracking, and loyalty programs. Through automation and structured data flow, it eliminated manual inefficiencies and improved overall business performance. Future enhancements include customer portal integration, dashboards, and AI-driven recommendations using Salesforce Einstein.