

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

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## Project Overview

HandsMen Threads is a brand in men's fashion that aims to improve how it manages customers, orders, and inventory. To achieve this, the company is developing a Salesforce CRM system that will organize all important data in one place. This project makes data handling faster, more accurate, and more secure in order to help the business serve their customers better.

This CRM will automate several business processes such as sending order confirmations, tracking customer loyalty, and alerting the warehouse when stock levels are low. These business process improvements will help the company improve their day-to-day operations and in turn make smarter business decisions.

## Objectives

The main goal of this Salesforce CRM is to make HandsMen Threads more efficient in handling customer data, sales, and stock management.

### Specific Objectives:

- Automatically send customers an email once their order is confirmed.
- Update loyalty points and status based on how often customers buy and automatically send emails regarding loyalty status
- Notify the team when product stock drops below five items
- Maintain clean and consistent data across the system

## Phase 1: Requirement Analysis & Planning

### Understanding Business Needs

- Organize all data about customers, products, and orders in one system
- Reduce manual work by using automation for emails and tracking stocks
- Keep data accurate and secure

### Defining the project scope

- Create custom objects for customers, products, orders, and loyalty tracking
- Add validation rules to prevent wrong data entries
- Build automation for customer emails, stock alerts, and loyalty updates

### Data and Security Model

- Custom objects: Customer\_\_c, Order\_\_c, Inventory\_\_c, LoyaltyProgram\_\_c
- Relationships: connect orders to both customers and products

- Security: use profiles, roles, and permission sets to control access

## Stakeholders

- Project Manager – Oversees the whole project
- Salesforce Admin – Sets up the system and manages data
- Developer – Creates the automation and Apex codes
- Staff Users – Uses the CRM for daily work

## Execution Plan

1. Set up the salesforce environment
2. Create objects and connect them properly
3. Add automation (flows, Apex triggers, batch jobs)
4. Test all features
5. Deploy, finalize documentation, and finalize demo video.

# Phase 2: Salesforce Development – Backend & Configurations

## Setup

- Salesforce environment created and configured
- Sandbox used for testing before live deployment.

## Customizations

- Custom objects and fields for Customers, Orders, and Products.
- Validation rules to maintain data accuracy
- Automated emails for stock alerts, loyalty status, and order confirmations.

## Apex and Automation

- Apex Trigger: updates loyalty points after each purchase
- Batch job: processes bulk orders every midnight to keep inventory updated in real time
- Asynchronous Apex: runs background updates without slowing the system

## Screenshots

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Description

API Name

HandsMen\_Customer\_\_c

Custom

✓

Singular Label

HandsMen Customer

Plural Label

HandsMen Customers

Enable Reports

✓

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Track Field History

Deployment Status

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Q Quick Find

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Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
FirstName	FirstName__c	Text(60)		
FullName	FullName__c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName__c	Text(60)		
Loyalty Status	Loyalty_Status__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Total Purchases	Total_Purchases__c	Number(18, 0)		

# HandsMen Order

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Description

API Name  
HandsMen\_Order\_\_c

Custom

✓

Singular Label  
HandsMen Order

Plural Label  
HandsMen Orders

Enable Reports  
✓

Track Activities

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Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen OrderNumber	Name	Auto Number		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

HandsMen Product

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Validation Rules

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Details

Description

API Name  
HandsMen\_Product\_\_c

Custom

Singular Label  
HandsMen Product

Plural Label  
HandsMen Products

Enable Reports  
✓

Track Activities

Track Field History

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7 Items, Sorted by Field Label

Quick Find

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Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(60)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

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Conditional Field Formatting

Details

Description

API Name  
Inventory\_\_c

Custom

Singular Label  
Inventory

Plural Label  
Inventories

Enable Reports  
✓

Track Activities

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Deployed

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Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(60)		

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Details

Description

API Name  
Marketing\_Campaign\_\_c

Custom

Singular Label  
Marketing Campaign

Plural Label  
Marketing Campaigns

Enable Reports  
✓

Track Activities

Track Field History

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7 Items, Sorted by Field Label

Quick Find

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Deleted Fields

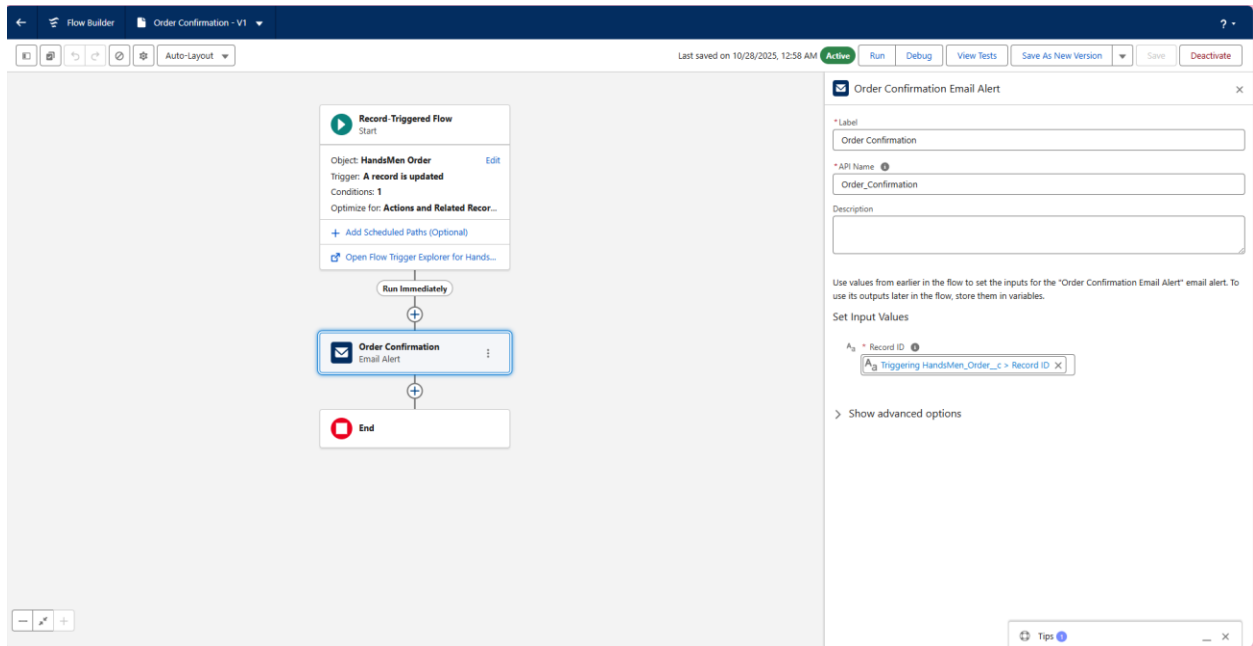
Field Dependencies

Set History Tracking

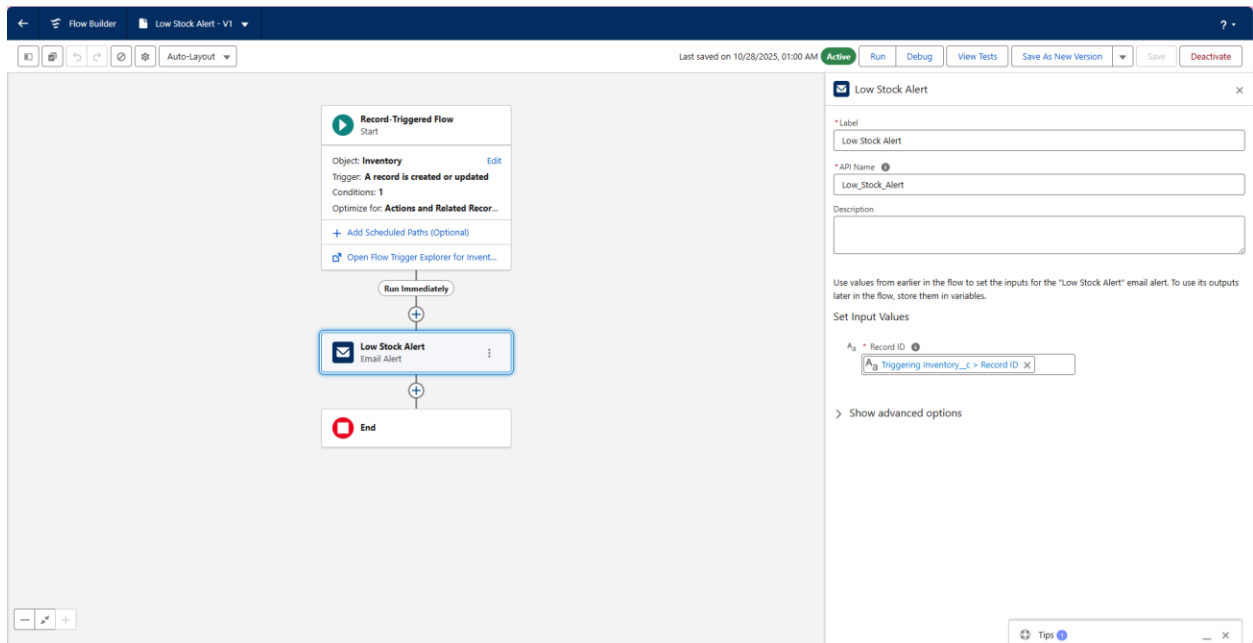
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		



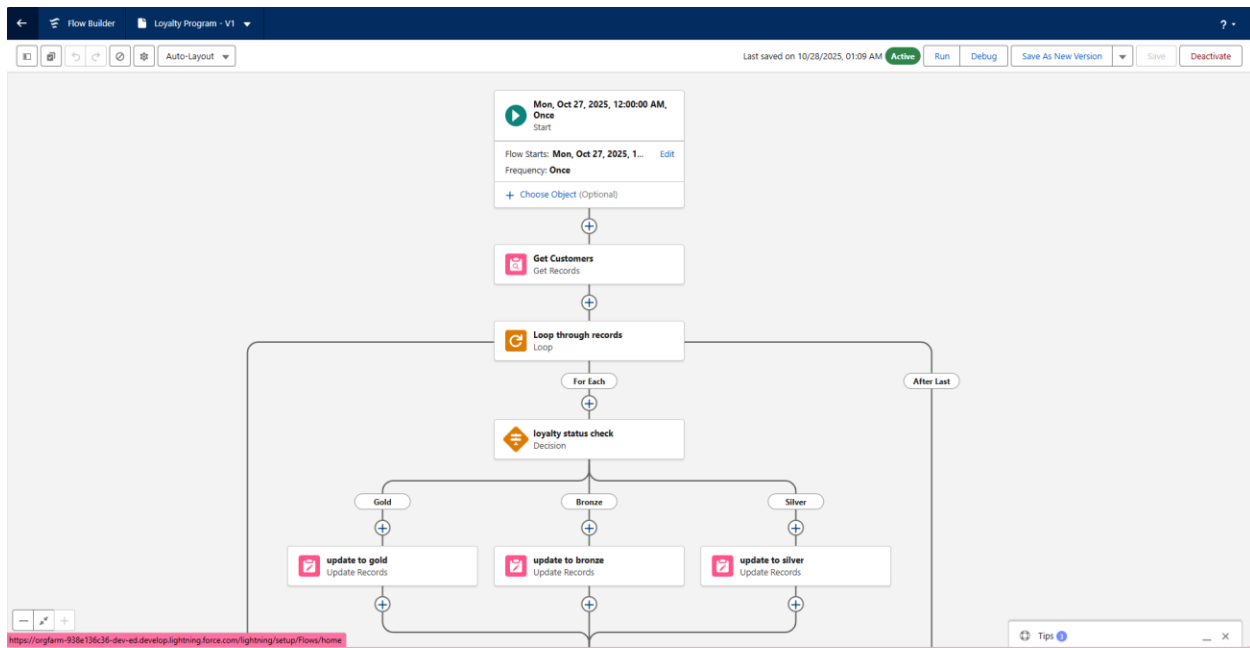
## Order Confirmation Flow



## Low Stock Alert Flow



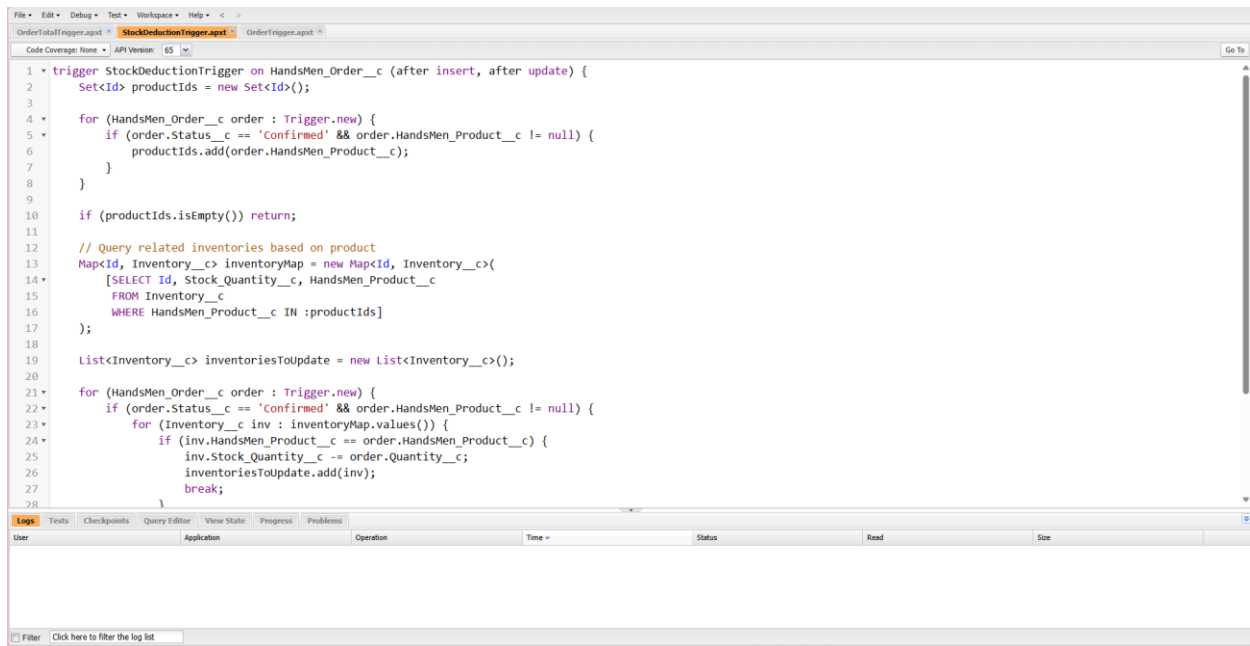
## Loyalty Program Flow



## Order Total Trigger

```
1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2   Set<Id> productIds = new Set<Id>();
3
4   for (HandsMen_Order__c order : Trigger.new) {
5     if (order.HandsMen_Product__c != null) {
6       productIds.add(order.HandsMen_Product__c);
7     }
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      HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17      if (order.Quantity__c != null) {
18        order.Total_Amount__c = order.Quantity__c * product.Price__c;
19      }
20    }
21  }
22 }
```

## Stock Deduction Trigger



```
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
21    for (HandsMen_Order__c order : Trigger.new) {
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                    inventoriesToUpdate.add(inv);
27                    break;
28                }
29            }
30        }
31    }
32
33    update inventoriesToUpdate;
34}
```

## Order Trigger

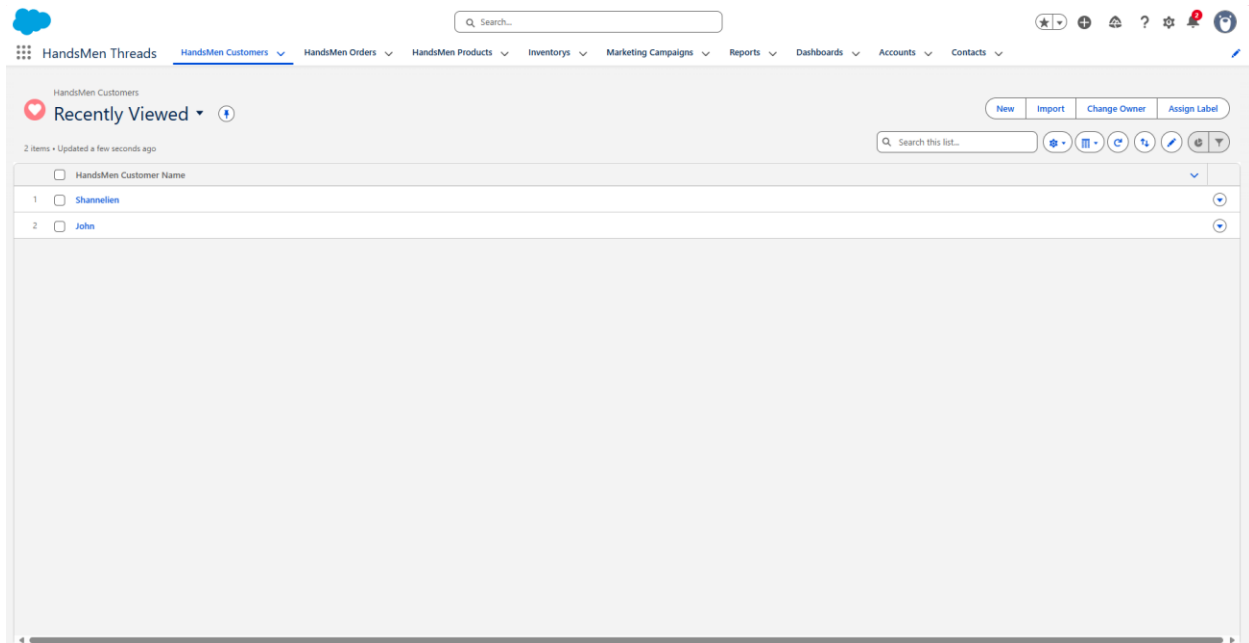


```
1 trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
2
3     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
4
5         OrderTriggerHandler.validateOrderQuantity(Trigger.new);
6
7     }
8
9 }
```

## Phase 3: UI/UX Development & Customization

### App Setup

- Created “HandsMen Threads CRM” using App Manager
- Added tabs for Customers, Orders, Products, and Loyalty Program



### User Management

- Different roles were assigned to different users: Full access for Admin users, Orders & Customer access for Sales users, and Read/Write access to Inventory for Warehouse users.

### Reports and Dashboards

- Dashboards display top customers, sales trends, and low stock items.

## Data Migration, Testing & Security

### Data Accuracy

- Enabled field history tracking for key objects
- Set up rules to prevent duplicate data entries.

### Security Setup

- Created profiles, roles, and permission sets to manage access properly
- Sharing rules used to limit who can see financial or customer data.

## Testing

- Test cases covered the following:
  - Order confirmation emails are sent correctly
  - Loyalty points update after a purchase
  - Stock alerts trigger when items go below five

Test Case ID	Feature	Expected Output	Status
TC-001	Automated Order Confirmation	Customer receives an email confirming the order details	Pass
TC-002	Loyalty Program	The system automatically updates the customer's loyalty points and status level	Pass
TC-003	Automated Stock Alert Notification	System automatically sends an email alert to the warehouse team notifying them that the product stock has dropped below 5 units	Pass

## Phase 5: Deployment, Documentation & Maintenance

### Deployment

- Moved setup from sandbox to production
- Double-checked all automations and reports after deployment

### Maintenance

- Monitor batch jobs and check for system errors regularly
- Regularly check for duplicate or outdated records
- Update flows or Apex codes when errors or bugs appear

## Conclusion

The Salesforce CRM built for HandsMen Threads made a big difference in how the company handles its operations. It improves data accuracy, automated routine tasks, and strengthened customer relationships, achieving the goal of CRM systems. It helps the company/business make better decisions and grow faster because of the improved and clearer view of sales performance, product availability, and customer loyalty.

## Future Enhancements

- Add AI-based product recommendations for customers
- Create an AI chatbot for customers' usual inquiries and order tracking
- Connect the CRM with popular e-commerce platforms to make order handling more smoother
- Build a mobile app version for sales representatives to allow them to access important information anytime, anywhere