

HandsMenThreads: Elevating the Art of Sophistication in Men's Fashion

Project Overview:

This project explains the development of a customized Salesforce CRM system for HandsMen Threads, a men's fashion and tailoring brand that aims to improve its customer service and internal operations. In a competitive retail environment, businesses need efficient digital systems that help organize data, streamline processes, and support customer engagement. The CRM was designed to address these needs by improving workflow management, ensuring accurate and secure data, and strengthening communication across key areas such as sales, inventory, and marketing. The system is built on a structured data model containing essential custom objects including Customer, Order, Product, Inventory, and Marketing Campaign, which allow the brand to manage its daily business activities in a more organized and reliable way.

To further enhance efficiency, the project included several automated processes such as sending order confirmation emails, updating customer loyalty status, checking low-stock items, and performing nightly bulk updates through scheduled Apex jobs. These automations reduce manual tasks and provide faster, more consistent support for both customers and staff. Validation rules were added to maintain data accuracy, while a role-based access model ensures that only authorized team members can view or modify specific information. Overall, this CRM implementation brings significant value to HandsMen Threads by improving customer communication, increasing productivity through automation, and creating a system that can grow with the company. It provides a strong digital foundation for future expansion, better customer strategies, and continued success in the men's fashion industry.

OBJECTIVE

The main objective of this project was to create and implement a customized Salesforce CRM for HandsMen Threads to improve everyday business operations and strengthen customer satisfaction. The system was developed to streamline processes, support accurate data management, and improve coordination across different departments. To achieve these goals, the project focused on the following key points:

- Automating important routine tasks such as sending order confirmations, updating customer loyalty status, and alerting the team when product stock becomes low.
- Ensuring accurate and consistent data across all records through the use of strong validation rules.
- Providing immediate visibility into inventory levels, customer activity, and sales performance to support better decision-making.
- Improving collaboration among the sales, inventory, and marketing teams by giving them access to organized and real-time information.
- Enhancing customer experience through personalized communication and automated loyalty program updates.

Phase 1: Requirement Analysis & Planning

1. Understanding Business Requirements: Summarize the user needs and problems being solved.

The primary needs and challenges of HandsMen Threads were identified to guide the development of the Salesforce CRM. The business needed a centralized system that could store and manage all customer, product, order, and inventory information in a

consistent and organized manner. Before the CRM implementation, the company struggled with scattered data, manual tracking of inventory, and slow communication between departments, which often led to delays and errors in order processing. There was also a strong need for automated processes that could reduce manual work, such as sending order confirmations, updating customer loyalty status, and alerting staff when stock levels became low. In addition, the sales, inventory, and marketing teams required real-time access to accurate information to support faster decision-making and better coordination. The CRM was designed to address these needs and create a smoother, more efficient workflow for the entire organization.

2. Defining Project Scope and Objectives

- Create five essential custom objects: Customer, Product, Order, Inventory, and Marketing Campaign.
- Build object relationships to ensure accurate and connected data flow.
- Implement validation rules for accurate inputs and data integrity.
- Configure security using profiles, roles, and permission sets.
- Prepare email templates for communication and notification processes.

3. Design Data Model and Security Model

- Lookup and Master-Detail relationships between Customers → Orders → Products.
 - **HandsMen Customers** – Main object used to store all customer-related records and connect to other business processes.
 - **HandsMen Orders** – Holds information about each customer order and links to the necessary customer and product data.
 - **HandsMen Products** – Contains the full catalog of items offered by the business, along with important product details.
 - **Inventories** – Tracks available stock for each product and supports monitoring of item availability.
 - **Marketing Campaigns** – Used to organize and manage outreach efforts aimed at specific groups of customers.
 - **Reporting and Dashboard Objects** – Standard Salesforce components used to summarize information from the main objects to support analysis and decision-making.
- Master-Detail relationship between Product and Inventory for stock tracking.
- Use profiles, roles, and permission sets for access control.

4. Stakeholder Mapping

- CEO
- Sales Team
- Inventory Team
- Marketing Team

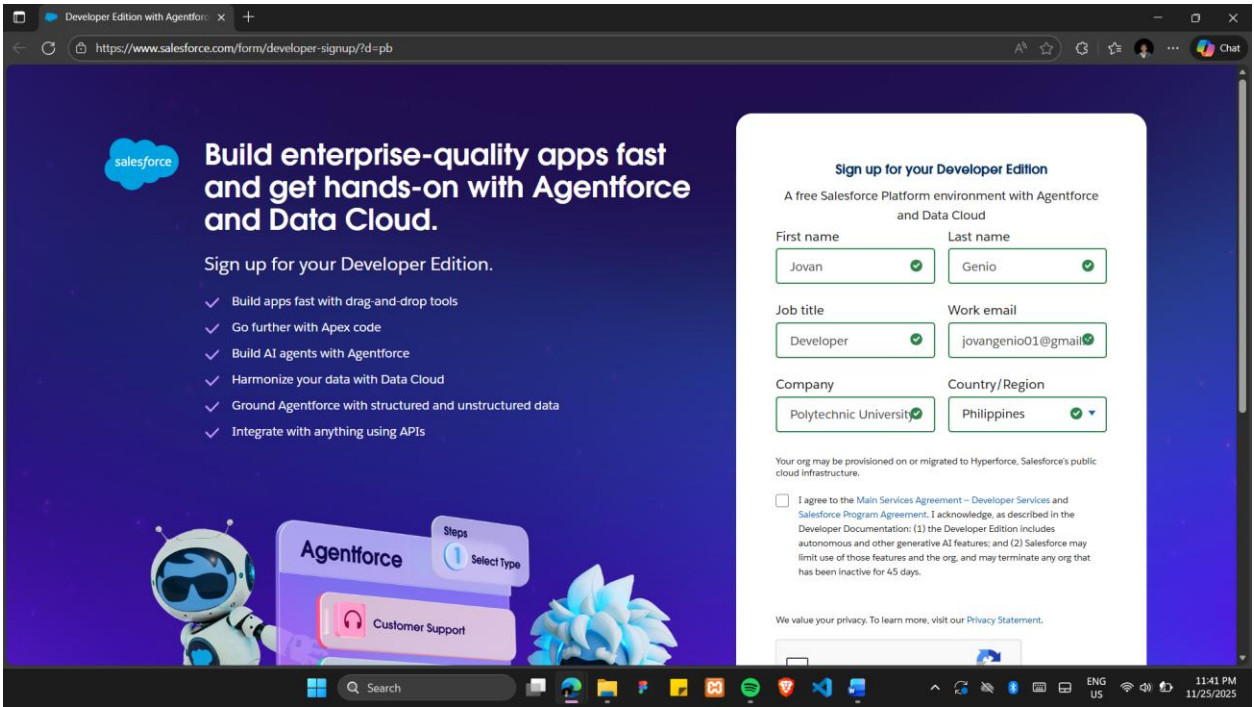
5. Execution RoadMap

- Environment Setup
- Object & Field Creation
- App & UI Configuration
- Security Setup
- Validation Rules & Automation
- Testing & Deployment

Phase 2: Salesforce Development - Backend & Configurations

1. Setup environment & DevOps workflow

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>
- The account was verified, password set and access was granted to the Salesforce Setup page



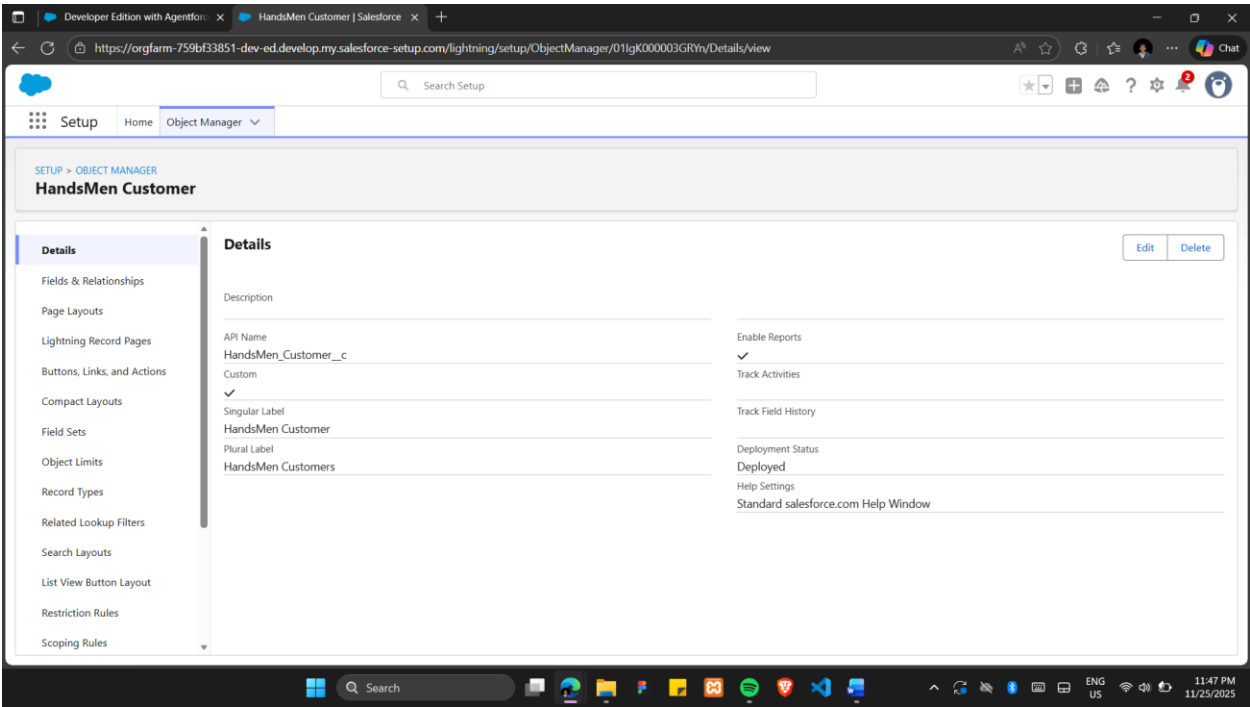
2. Customization of Objects, Fields

Five custom objects were created to store business-critical data:

- HandsMen Customer– Stores customer information such as email, phone number, and loyalty status.
- HandsMen Product– Stores product catalog details including SKU, price, and stock availability.
- HandsMenOrder–Stores customer orders, including quantities and order status.
- Inventory– Tracks stock levels and warehouse locations.
- Marketing Campaign– Stores promotional campaign details and scheduling information.

Steps Followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided the object label, name, and enabled reporting/search options



Developer Edition with AgentforHandsMen Order | Salesforce

https://orgfarm-759bf33851-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgK000003GRaP/Details/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

HandsMen Order

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_Order_c

Custom

✓

Singular Label

HandsMen Order

Plural Label

HandsMen Orders

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Developer Edition with AgentforHandsMen Product | Salesforce

https://orgfarm-759bf33851-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgK000003GRaX/Details/view

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Description

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Custom

✓

Singular Label

HandsMen Product

Plural Label

HandsMen Products

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Developer Edition with AgentforInventory | Salesforce

https://orgfarm-759bf33851-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgK000003GRsA/Details/view

Search Setup

SetupHomeObject Manager

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

Enable Reports

✓

Track Activities

Track Field History

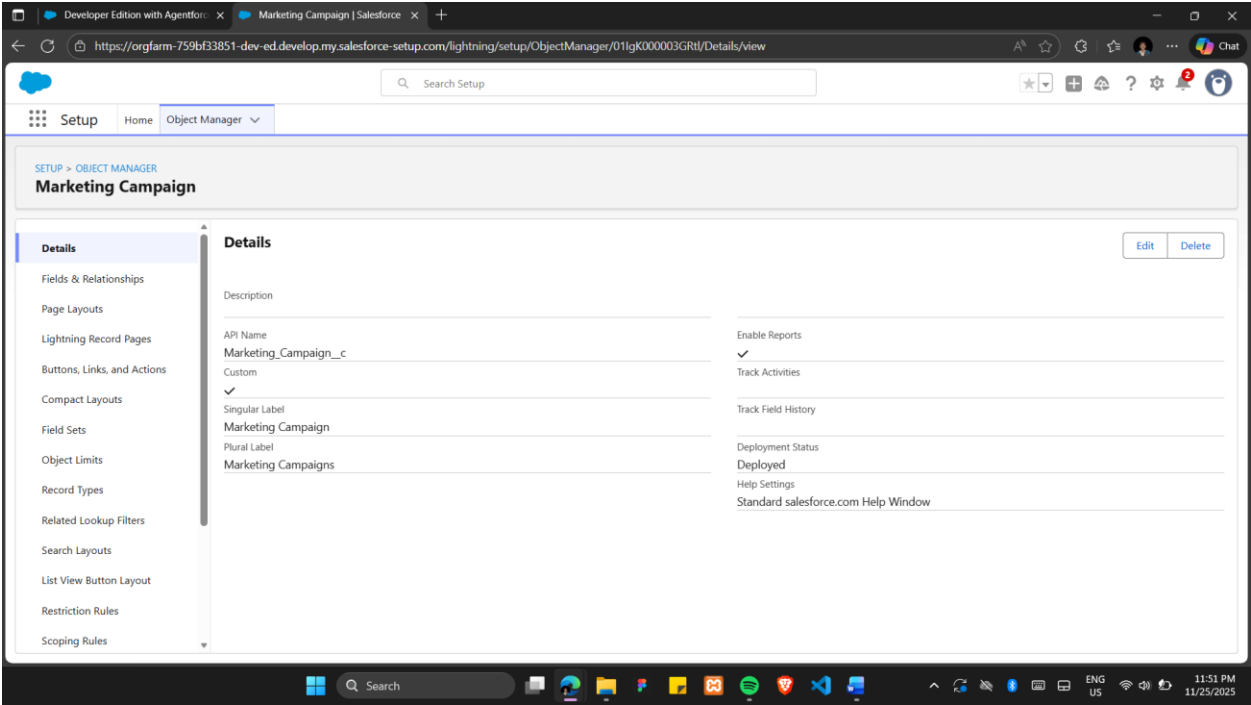
Deployment Status

Deployed

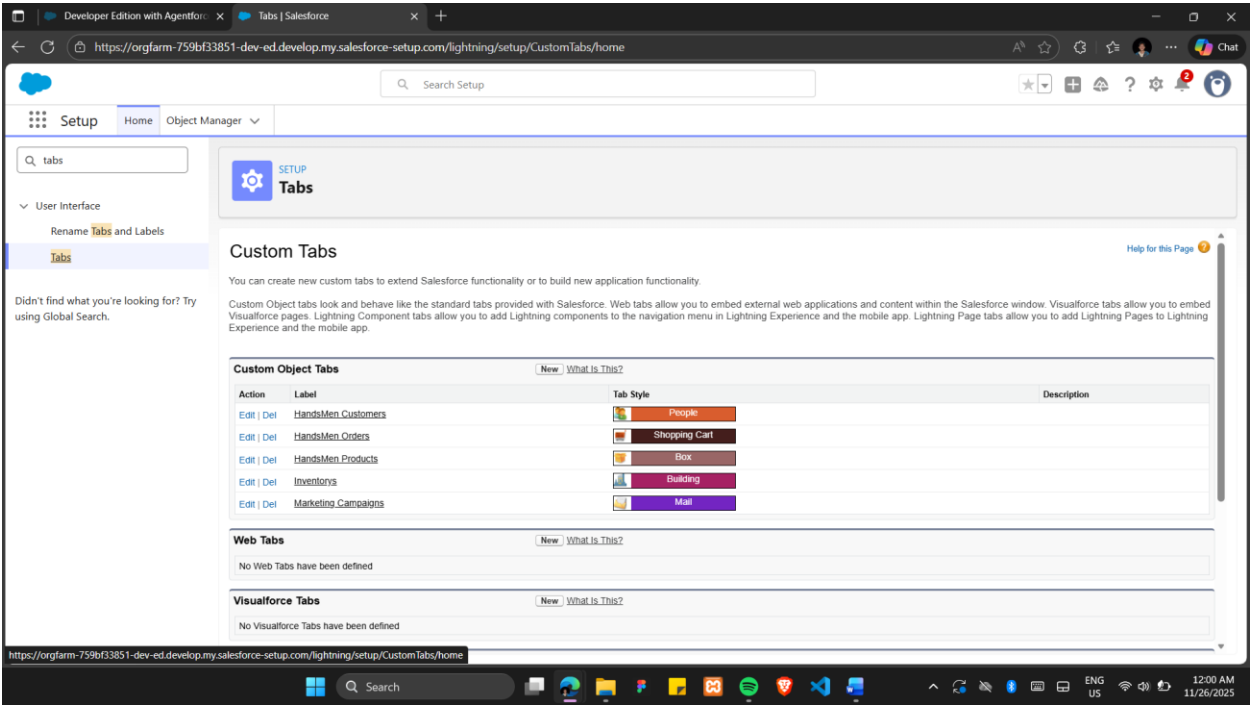
Help Settings

Standard salesforce.com Help Window

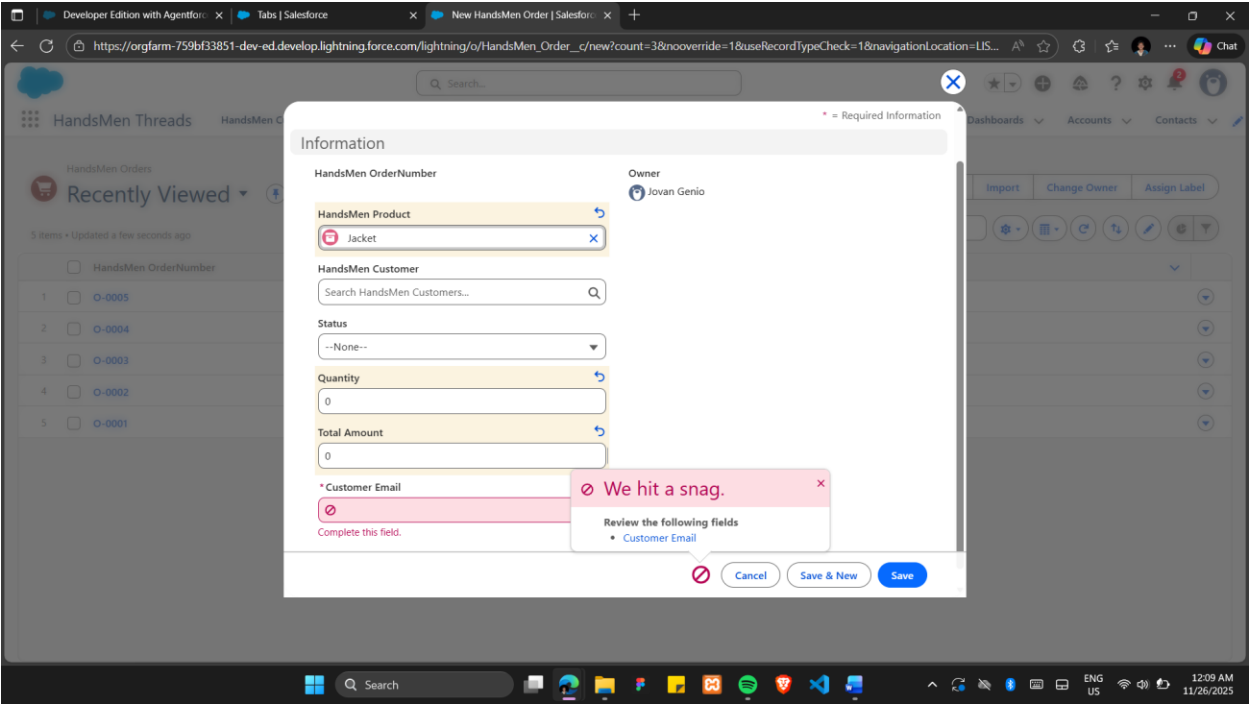
EditDelete



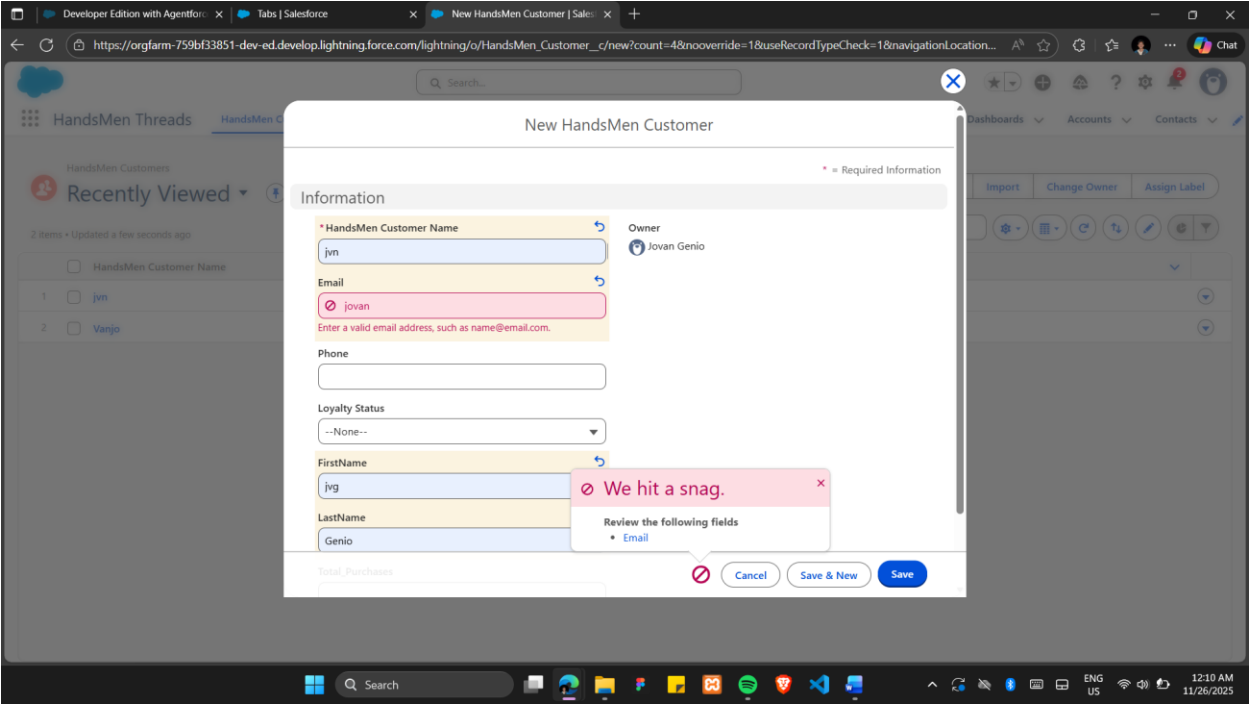
3. Lightning App Creation
- Built a custom Lightning App named HandsMen Threads with tabs.
 - Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
 - Assigned to the System Administrator profile.



4. Validation Rules
- To ensure accurate data entry and enforce business logic, the following validation rules were applied:
- Order Object: Prevents saving if Total_Amount c <= 0. Error: “Please Enter Correct Amount”

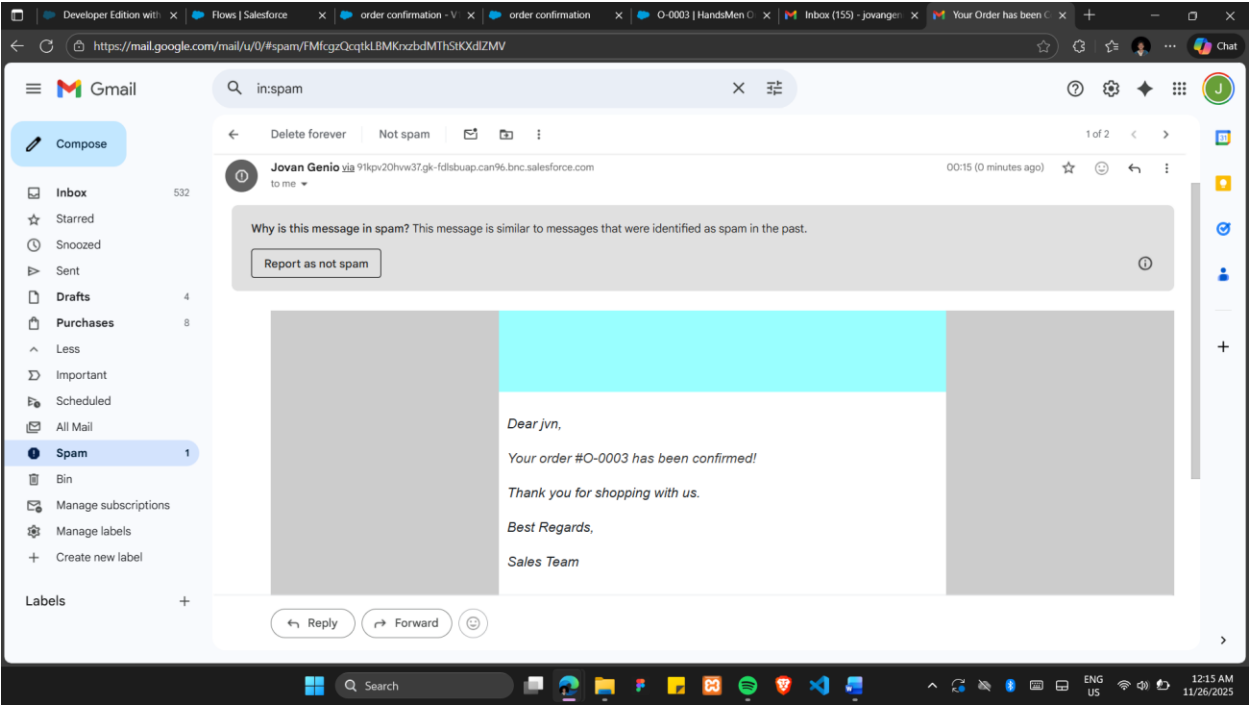
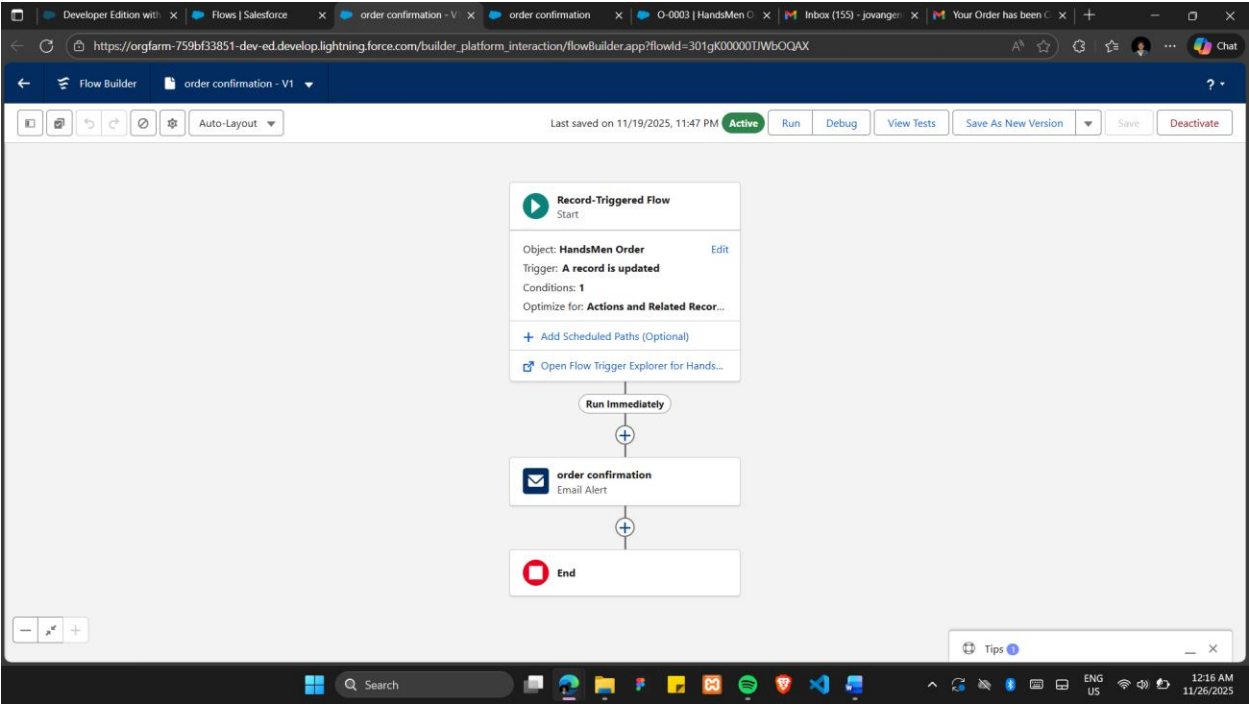


- Customer Object: Validates email contains @gmail.com.
Error: “Please fill Correct Gmail”

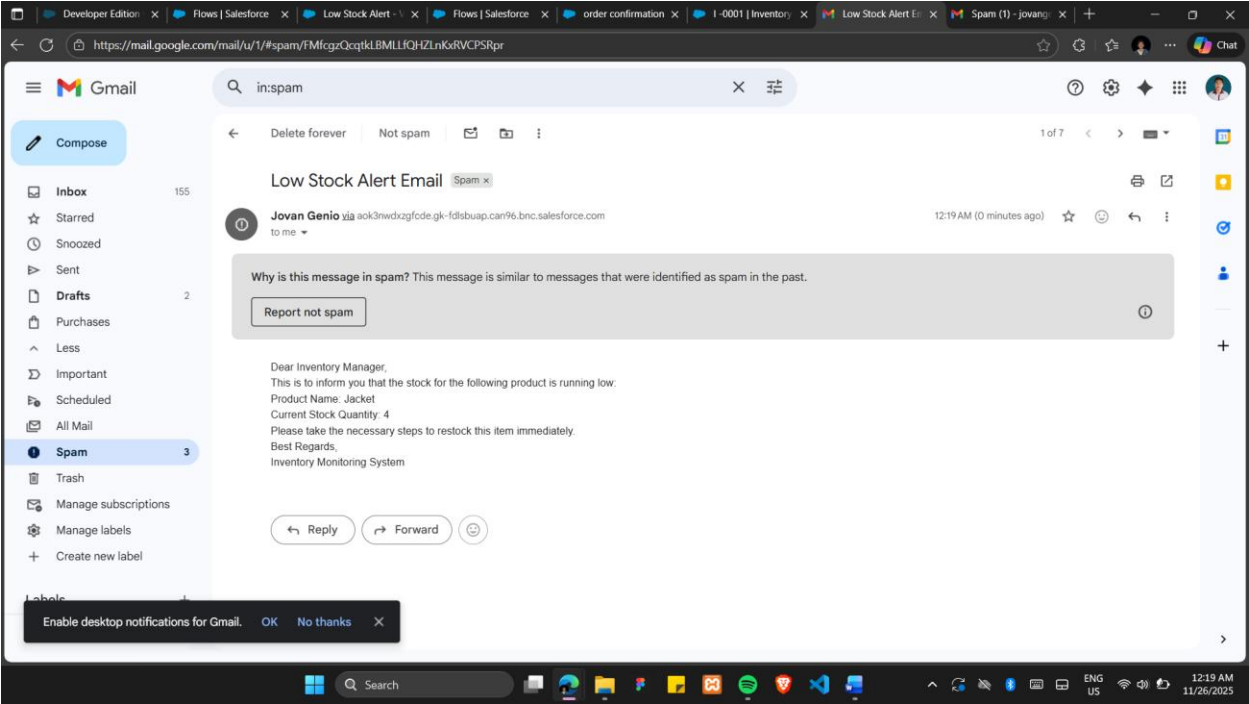
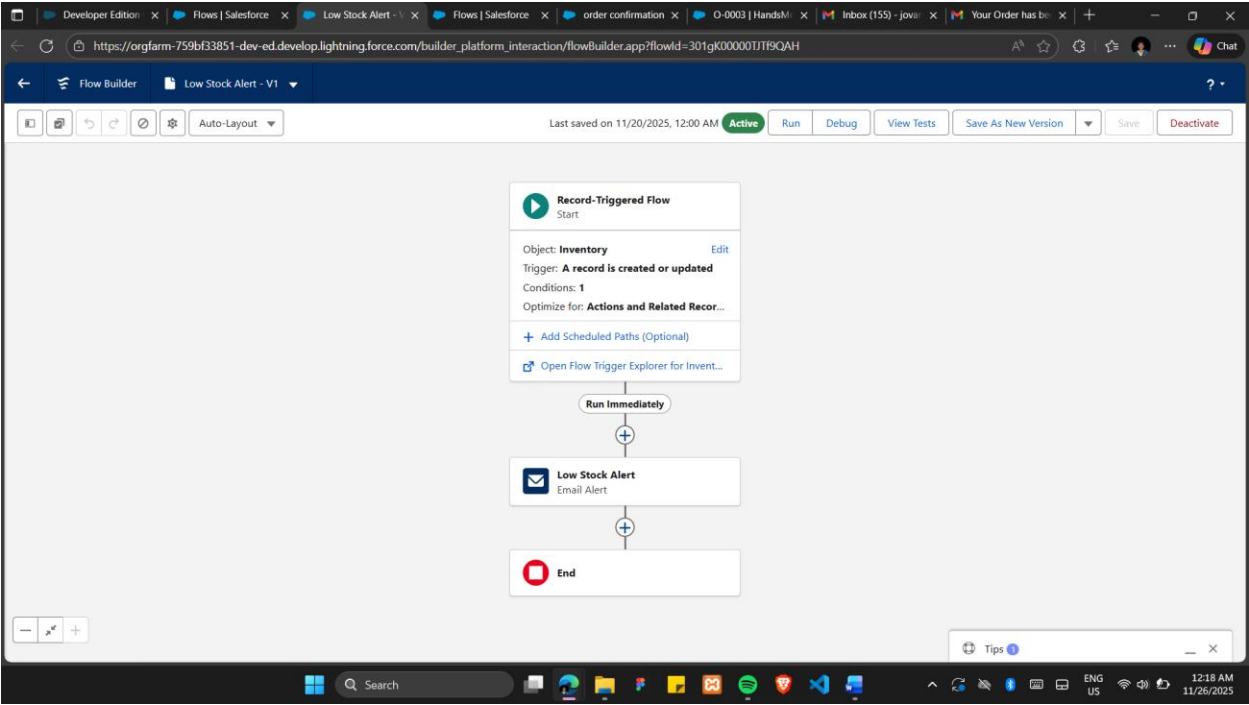


5. Automation (Flows)

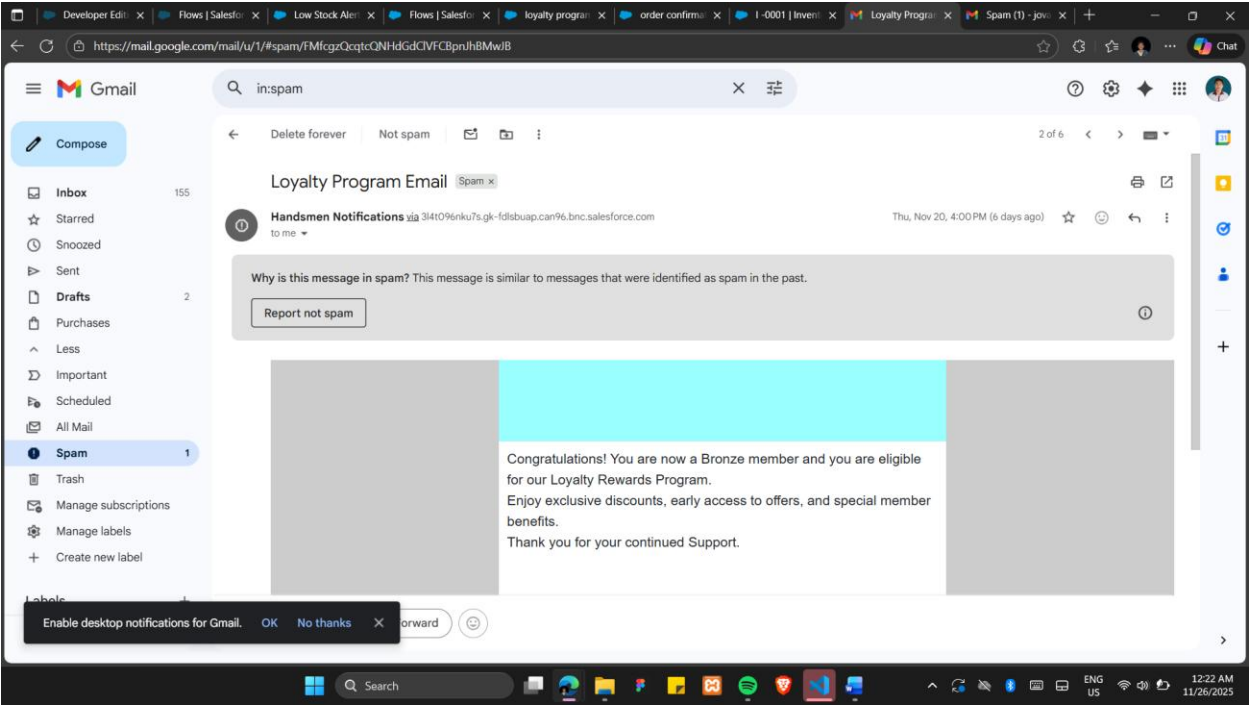
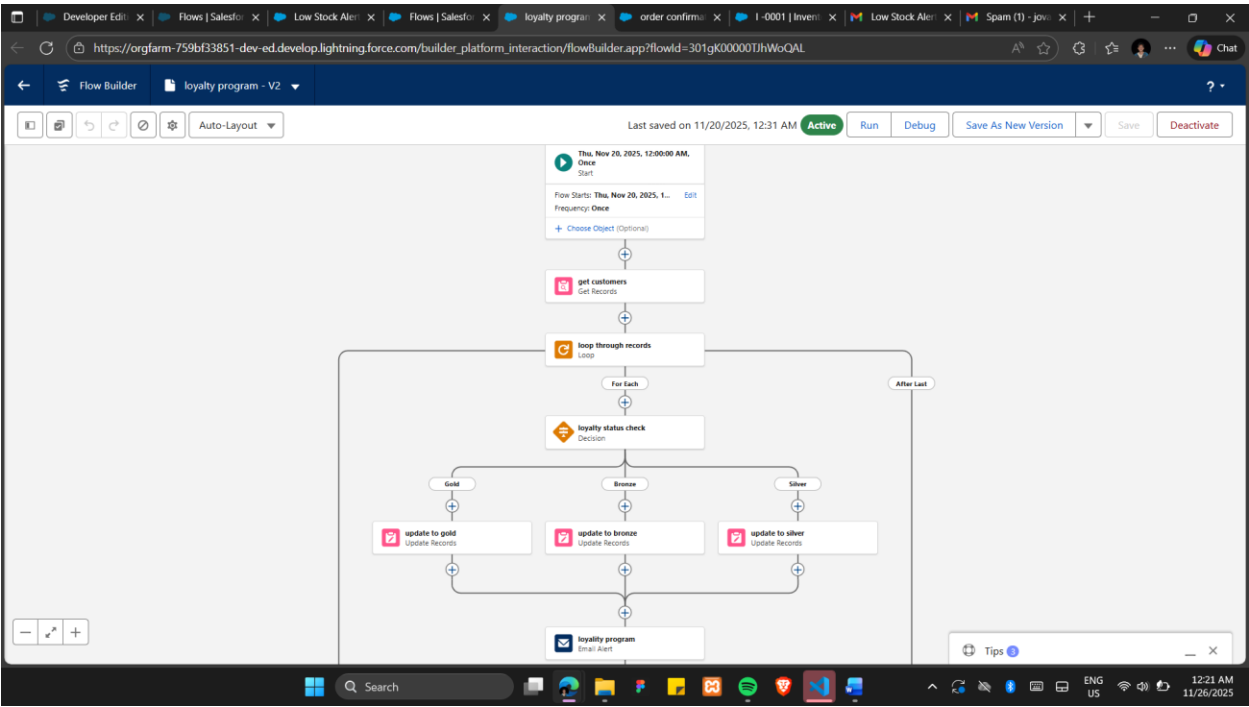
- Record-Triggered Flows
 - **Order Confirmation Flow-** The flow is triggered when an order status is updated to Confirmed. It automatically sends an Order Confirmation Email to the associated customer using the predefined email alert.



- **LowStock Alert Flow**
 - The flow is triggered when an inventory record's stock quantity falls below 5 units. It automatically sends a Low Stock Alert Email to the Inventory Manager using the configured email alert.

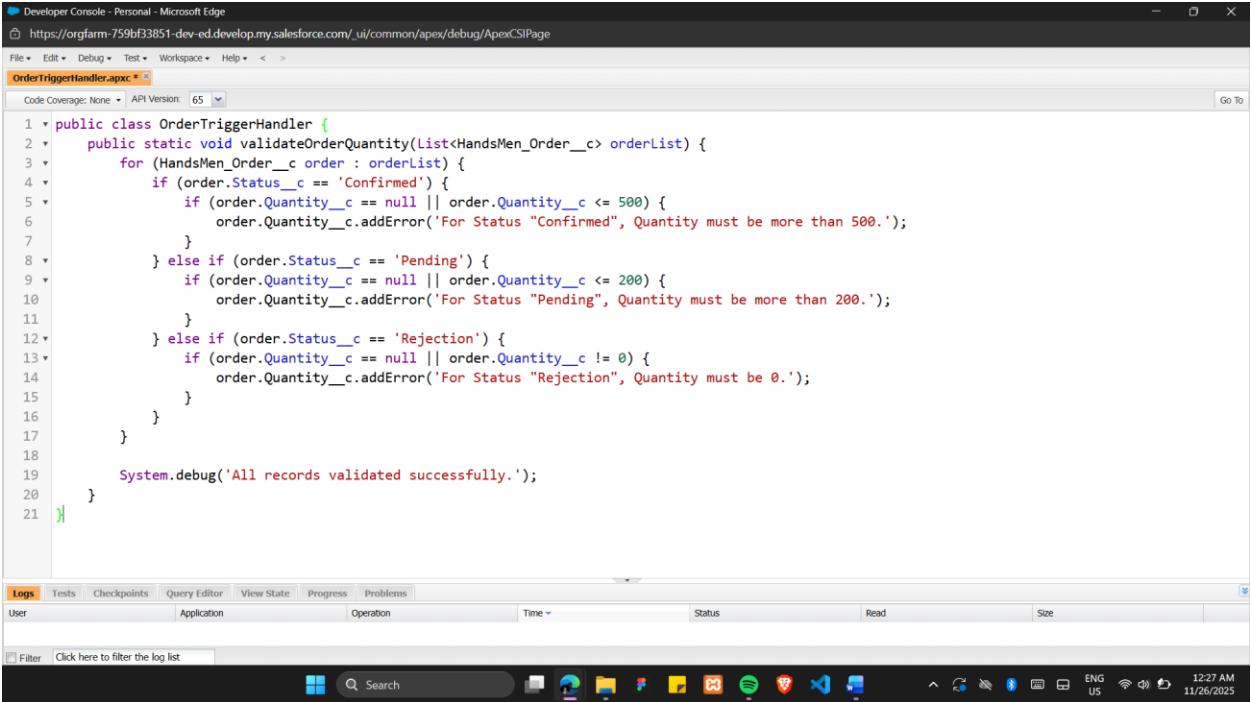


- **Scheduled-Triggered Flow**
 - Loyalty Program- Runs daily at midnight. Iterates through all customer records and automatically updates their Loyalty Status based on each customer's total purchase amount.



6. Apex Triggers

- OrderTotalTrigger–Automatically calculates the TotalAmount based on the order quantity and unit price.

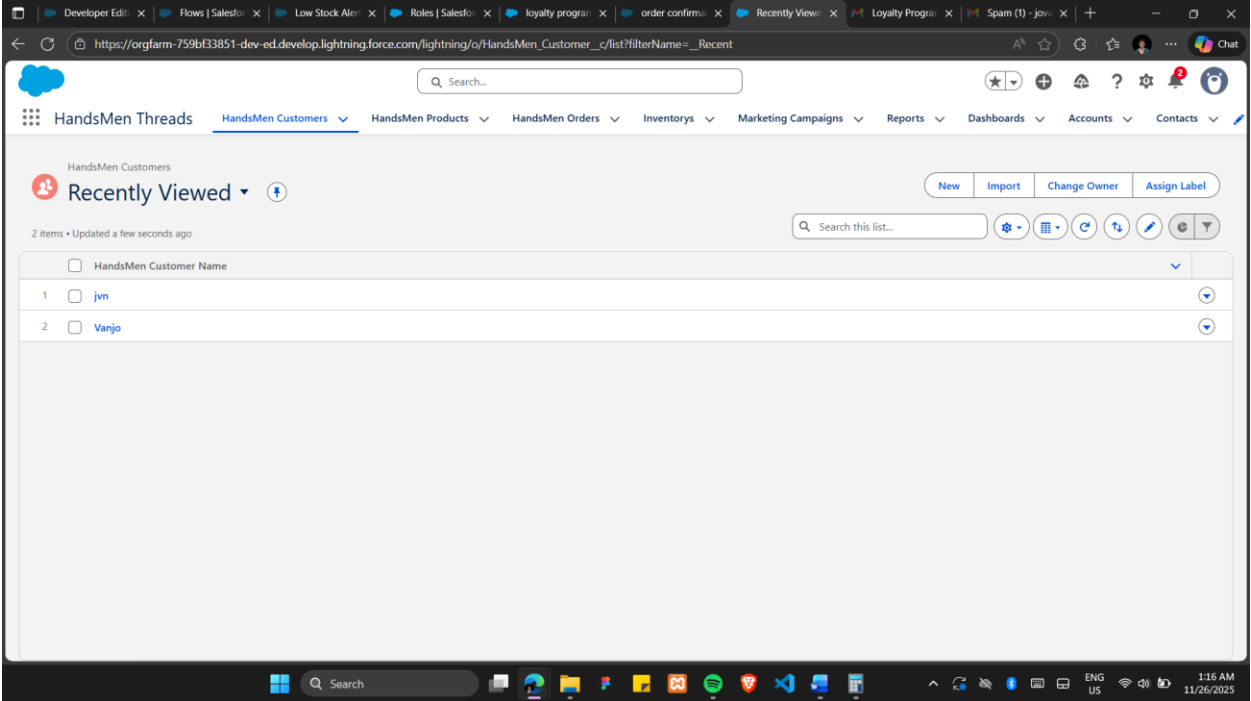


- Stock Deduction Trigger–Automatically deducts inventory stock levels whenever an order is placed and confirmed.

Phase 3: UI/UX Development & Customization

1. Lightning App Setup

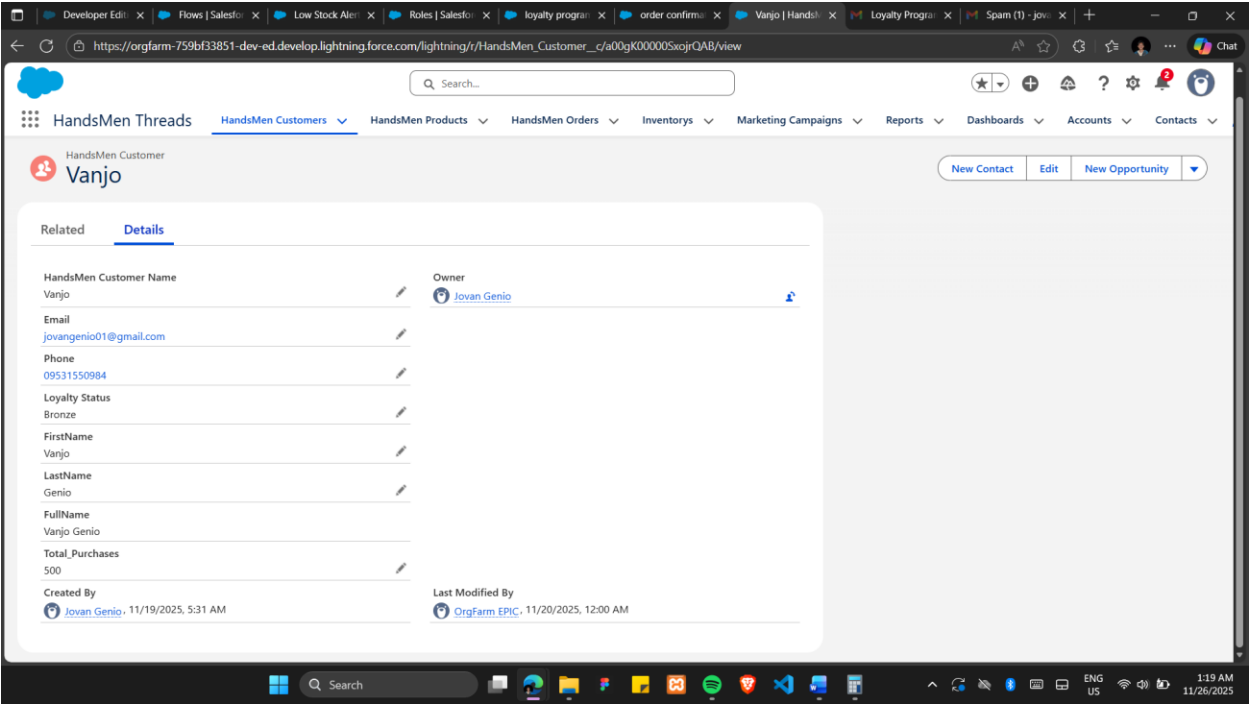
A custom Lightning App named HandsMen Threads CRM was created using the App Manager. This app includes essential navigation tabs such as Customers, Orders, Products, Inventory, Marketing Campaigns, Reports, and Dashboards. The app was designed to give users easy access to all key business objects in a single interface. It was assigned to the System Administrator profile to ensure full visibility during development and testing.



2. Page Layouts and Dynamic Forms

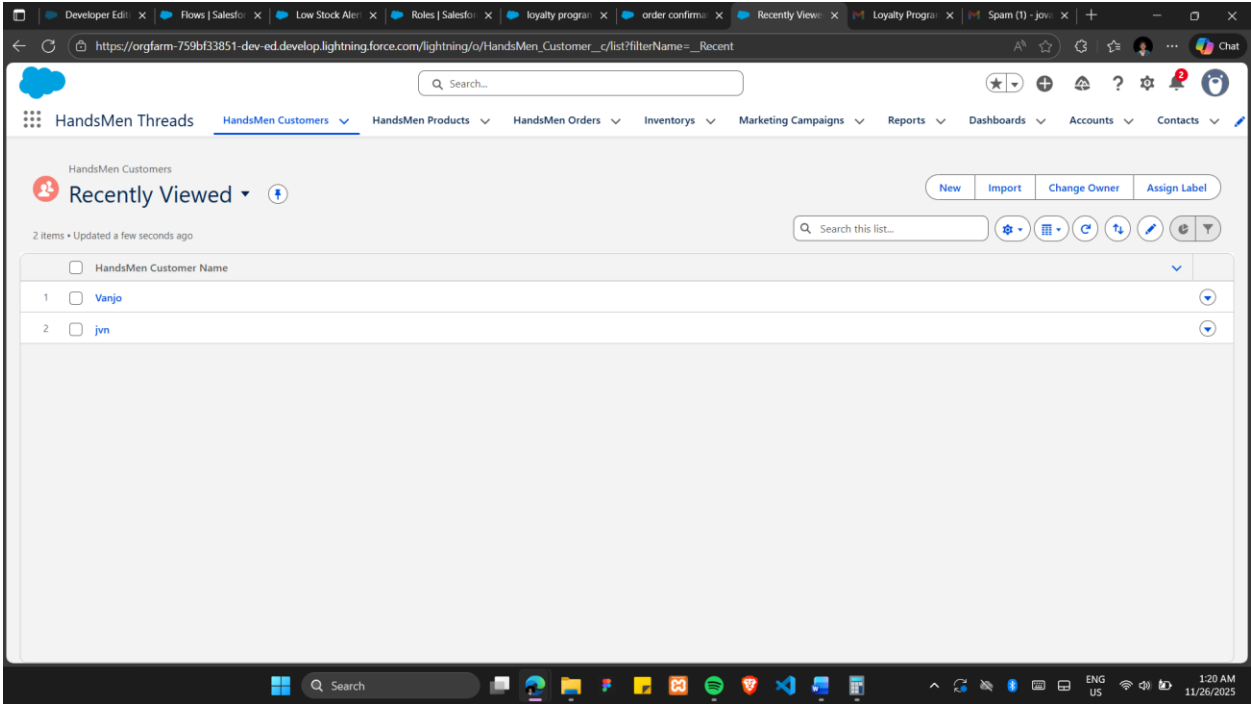
Customer Record Example:

The HandsMen Customers object was configured with a sample record to demonstrate how Page Layouts and Dynamic Forms enhance readability and user experience.

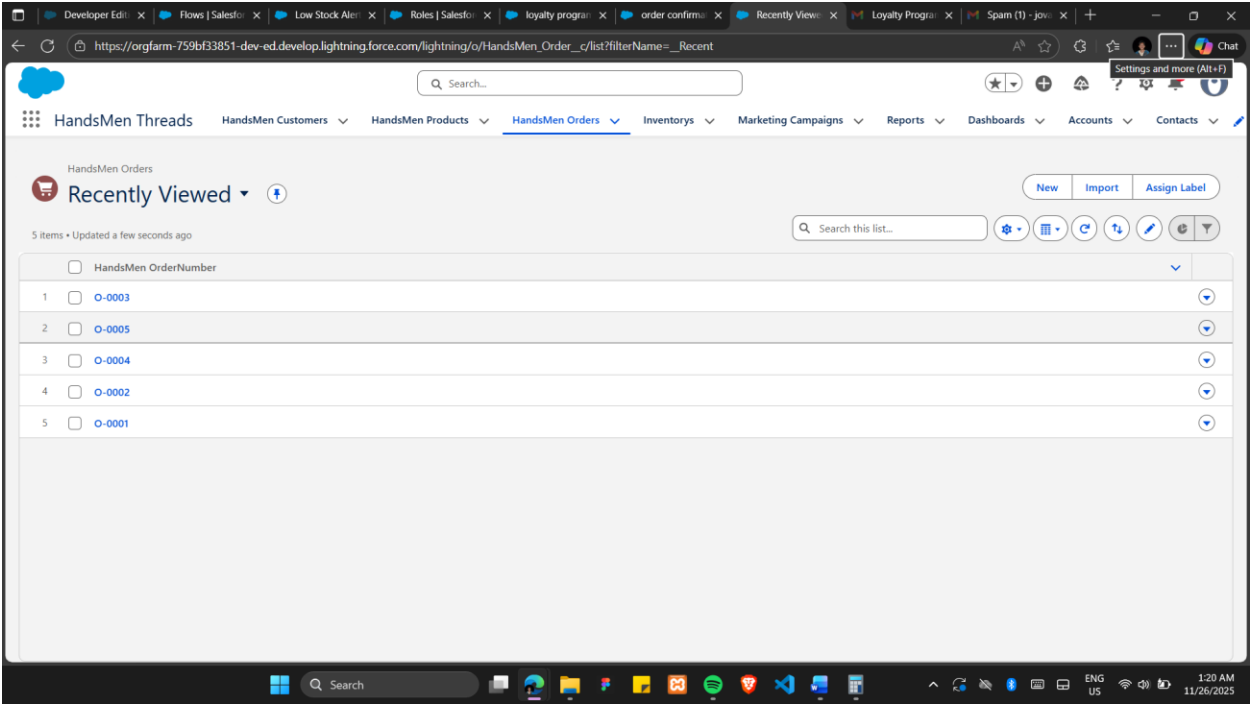


Use of Dynamic Forms:
Dynamic Forms were used to organize the page into well-structured sections, making important details easier to locate. Key sections include:

- **Customer Information**



- **Order Records**



- **Loyalty Summary**

Read-Only Fields:

Certain fields that are automatically updated by system automation were kept read-only to maintain data accuracy. These include:

- Loyalty Tier
- Total Purchase Value

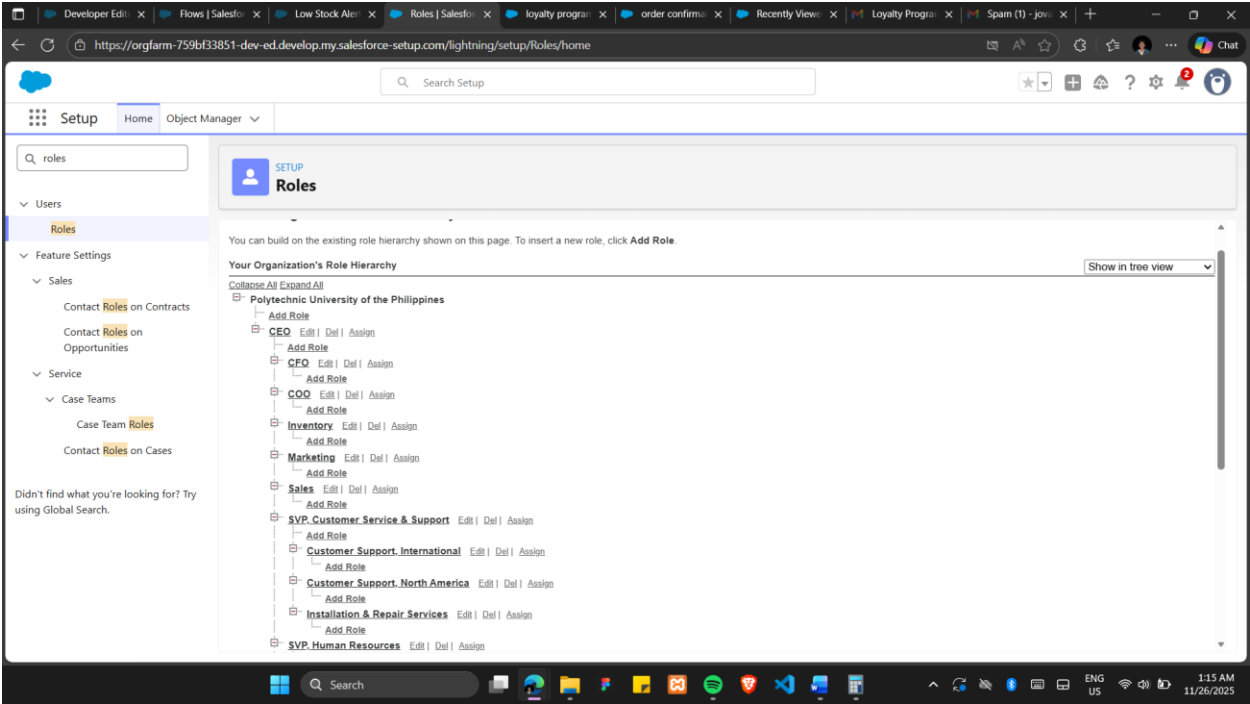
These fields appear in the **Details** tab and cannot be edited manually, ensuring system-generated values remain consistent.

3. User Management

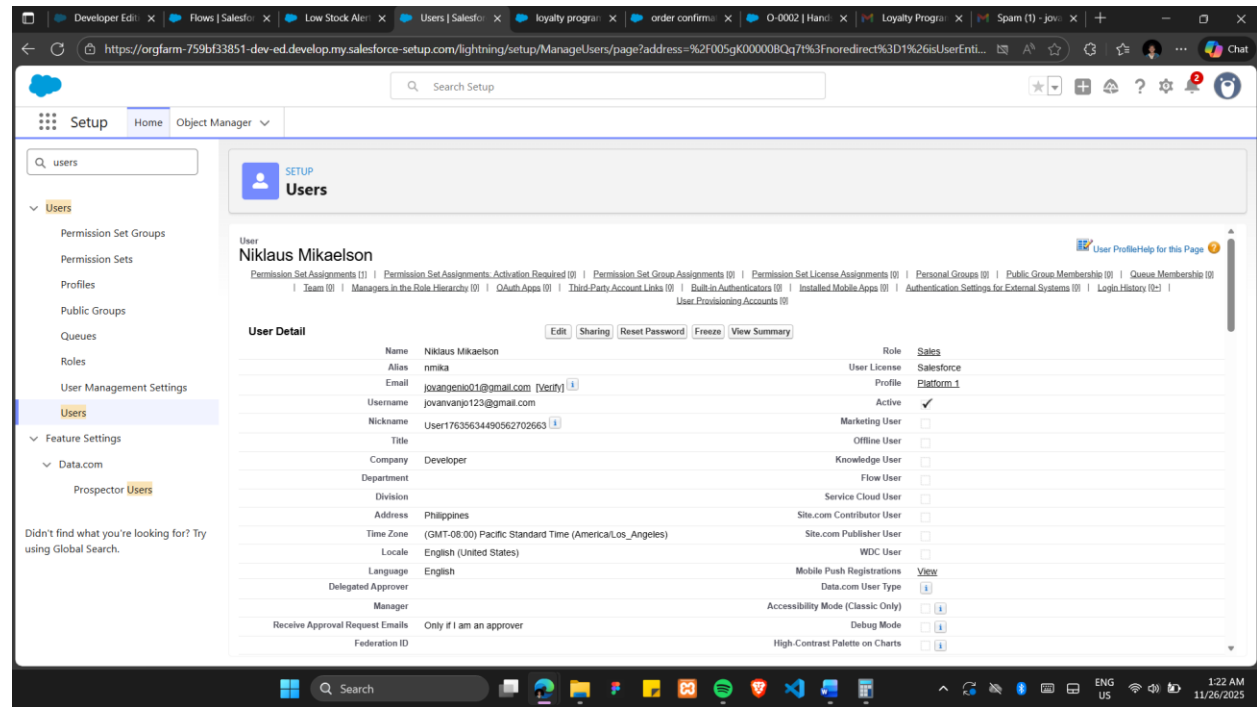
User access was structured to support secure and efficient operations. A custom profile called **Platform User** was created by cloning the Standard User profile and granting access to all required custom objects.

A role hierarchy was developed for major departments, including:

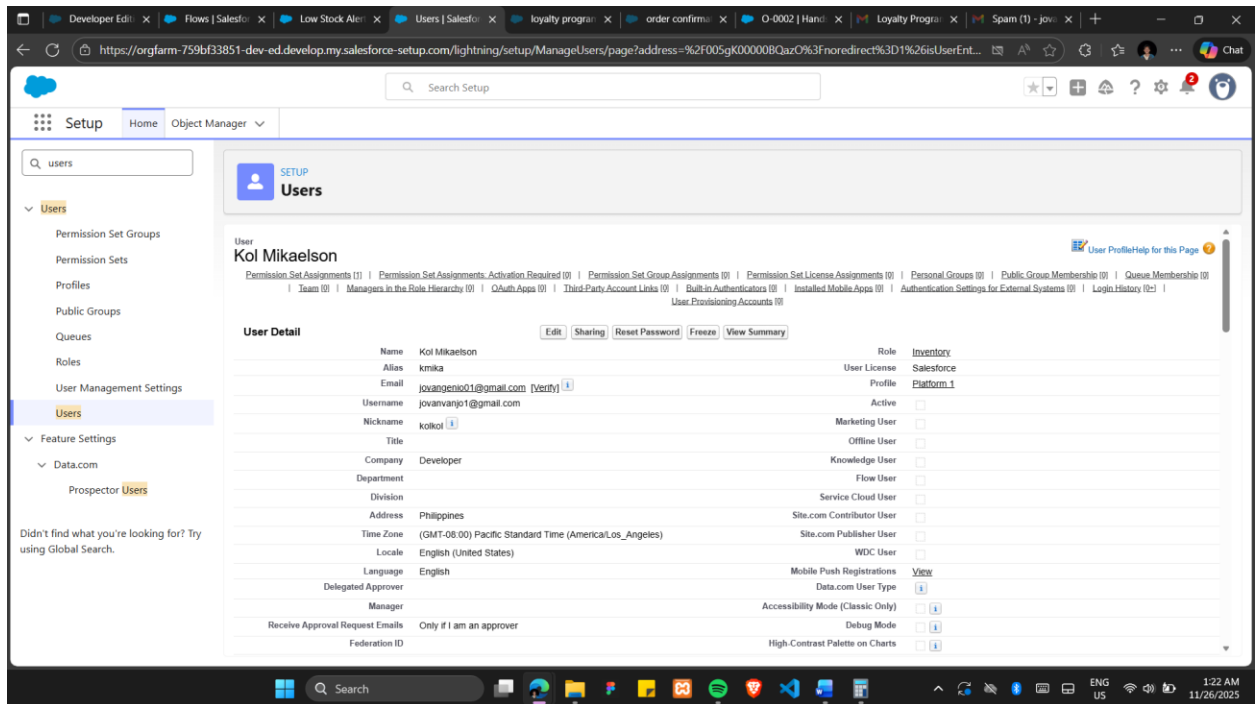
- **CEO**
- **Sales**
- **Inventory**
- **Marketing**



This structure ensured that each user could only access data relevant to their responsibilities. Example users created during setup include:
Niklaus Mikaelson – Sales Role (assigned Platform User profile)



Kol Mikaelson – Inventory Role (assigned Platform User profile)



Phase 4: Data Migration, Testing & Security

1. Data Loading Process

For the initial transfer of customer, product, and order information into Salesforce, two data-loading tools were used depending on the amount of data being uploaded.

- **Data Import Wizard**

This tool was used for smaller sets of data, such as customer records and basic order information. It is simple to use and supports quick uploads with guided field mapping.

- **Data Loader**

This tool handled larger datasets such as full product lists and inventory quantities. It is suitable for bulk imports because it supports mass insert, update, and upsert operations, making it ideal for both the initial data migration and future maintenance updates.

2. Data Quality

- **Field History Tracking**

Field history tracking was enabled for important objects to monitor changes and maintain data accuracy.

- **Orders (Order__c)**

- Tracked Fields: Status, Quantity, Total_Amount__c
- Purpose: Helps follow order progress and ensures financial values remain accurate.

- **Products (Product__c)**

- Tracked Fields: Price, Stock_Quantity__c
- Purpose: Records updates in product pricing and stock adjustments for transparency.

- **Duplicate Rules and Matching Rules**

To prevent duplicate records, Salesforce duplicate management features were used.

- A standard matching rule for customers checked similarities in fields such as Name, Phone, and Email.
- The system blocked the creation of duplicate customer records if a match was detected, ensuring clean and reliable data.

3. Access Controls

- **Profiles**

A custom profile was created for HandsMen Threads users, allowing them to Read, Create, Edit, and Update records for all custom objects such as Customers, Orders, Products, and Inventory.

- **Roles and Role Hierarchy**

Roles were arranged to reflect the company structure and manage record visibility. Higher roles had access to the records of users below them, supporting team oversight and reporting accuracy.

- **Permission Sets**

Permission sets were used to give additional access to certain users without modifying their main profile. This allowed flexibility in assigning extra permissions when needed.

- **Sharing Rules**

Sharing rules allowed teams to share specific records with other departments when collaboration was required, while still maintaining secure access to sensitive information.

This combined access control framework ensured that the CRM protected confidential data while allowing employees to perform their responsibilities effectively.

4. Creation of Test Classes

Apex test classes were created to confirm the accuracy and reliability of all automated features.

- **Email Validation:**

Tested the customer creation process using incorrect email formats to verify that validation rules prevented invalid entries.

- **Inventory Update:**

Simulated an order being placed to check whether product stock decreased correctly after each purchase.

- **Low Stock Alert:**

Tested scenarios where product quantities dropped below the threshold to ensure that automated stock alerts were triggered.

- **Loyalty Program Update:**

Verified scheduled processes that update loyalty status based on total purchase amounts, ensuring correct tier changes.

Phase 5: Deployment, Documentation & Maintenance

1. Deployment Strategy

The project used Salesforce's Change Set feature to move all components from the development environment to the live production system. This involved creating a package that included the custom Customer object, Automated Order Confirmation Flow, Apex Trigger for order calculations, and other customizations. Before the final move, the system performed a complete check to confirm all parts were included and worked together properly. After successful validation, all components were deployed to the production environment, ensuring a secure and smooth transition for end-users.

2. System Maintenance and Monitoring

The platform requires regular upkeep to maintain reliable performance. Key automated processes like the Loyalty Program Flow are scheduled to run daily and are monitored for any errors. The team performs regular data quality reviews using reports and dashboards to identify and clean duplicate or incomplete records. Before each of Salesforce's three annual updates, all automations, flows, and triggers are tested in a separate sandbox environment to prevent issues. The system also includes immediate alert features that notify administrators if any automated process fails, allowing for quick resolution. Regular checks ensure all automated tasks run efficiently within Salesforce's operational limits, maintaining system stability and performance.

CONCLUSION

The Salesforce CRM project for HandsMen Threads marks a major advancement in strengthening the company's operations and customer service. By creating a centralized system, the project resolved issues related to scattered information, slow communication, and manual inventory monitoring. The use of custom objects for customers, products, orders, inventory, and marketing helped organize important business data in a clear and structured way. Automations built through Flows and Apex reduced manual tasks by handling order confirmations, low-stock alerts, loyalty updates, and scheduled bulk processing automatically. These improvements increased productivity and supported faster, more personalized customer interactions. The role-based access model also enhanced data security by ensuring that each department could only access the information relevant to their role. Overall, the system provides a reliable and scalable platform that the company can continue to improve, preparing HandsMen Threads for future technological upgrades such as AI-based tools, smarter recommendations, and expanded marketing features.

With the successful setup of the Salesforce CRM, HandsMen Threads now has many opportunities for future improvements as the business continues to grow. Several potential enhancements include:

- **E-commerce Integration:** Connecting Salesforce to online selling platforms or websites to automatically sync orders, customers, and inventory in real time.
- **Mobile App Access:** Developing a Salesforce mobile application to allow sales and warehouse staff to view and update information while working in the field.
- **AI and Predictive Analytics:** Using Salesforce Einstein to study customer behavior, predict buying patterns, and offer smart product recommendations.
- **Enhanced Reporting:** Adding advanced analytics tools like Salesforce CRM Analytics (Tableau CRM) to get deeper insights into sales performance, stock movement, and marketing results.
- **Multi-Channel Marketing:** Expanding marketing activities to include SMS, WhatsApp, and social media by integrating tools such as Salesforce Marketing Cloud for broader communication.
- **Customer Self-Service Portal:** Creating an online portal where customers can check their orders, track deliveries, and manage their personal information independently.