

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

This project focuses on building a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The system was developed to simplify major business processes in sales, inventory, and marketing by creating five custom objects and automating workflows through Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex. Validation rules and role-based permissions were also added to ensure data accuracy and protect confidential information.

By bringing all these features together in one platform, HandsMen Threads can strengthen customer engagement, automate repetitive tasks, and manage inventory more effectively. The solution creates a scalable structure that supports future expansion and delivers a more personalized, seamless customer experience.

### **Objectives**

1. Build a centralized Salesforce CRM that consolidates customer, order, inventory, and marketing data into one organized system for HandsMen Threads.
2. Automate essential business processes using Flows, Email Alerts, and Apex to minimize manual tasks and boost efficiency.
3. Enhance customer engagement through personalized, automated communications such as order updates, loyalty messages, and marketing campaigns.
4. Maintain reliable and accurate data using validation rules, record-level security, and role-based access for sales, inventory, and marketing teams.
5. Establish a scalable CRM foundation that supports the company's long-term growth and expansion.
6. Strengthen inventory visibility and control through automated low-stock alerts and scheduled batch updates.

### **Technology Description**

This project uses Salesforce, a cloud-based CRM platform, to design and implement an integrated solution for HandsMen Threads. Salesforce provides a flexible and scalable environment where custom objects, automated workflows, and secure data structures can be created without relying on traditional, on-premise systems.

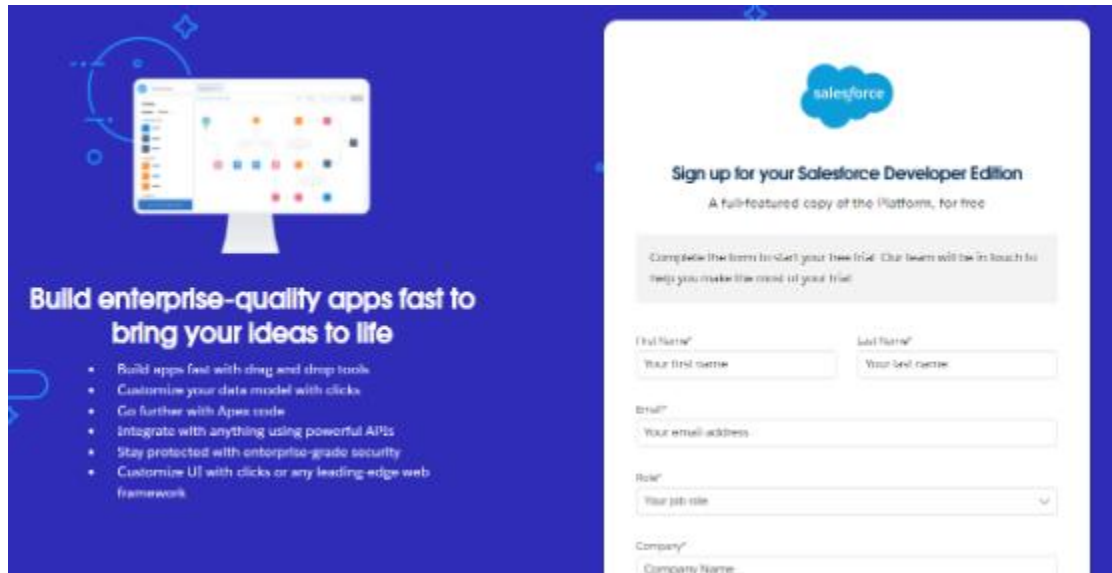
The build leverages key Salesforce features such as Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex. These tools enable process automation, real-time notifications, and deeper customization. Apex, Salesforce's programming language, was especially useful for tasks like batch stock updates and automated record processing.

Salesforce's role-based security model ensures that sensitive data is only accessible to authorized users, while its cloud-based architecture allows team members to log in from any device, at any time. Together, these technologies contribute to improved

operational efficiency, accurate data tracking, and a more customized customer experience for HandsMen Threads.

## Detailed Execution of the Project Phases

1. Creating a developer org in salesforce.



2. Object Creation

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

### 3. Data Management

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

### 4. Data Configuration, Data Security, Data Security Roles, Data Security Users, and Data Security Permission Sets

Validation Rules

Create Remaining Validation Rules

Profile - Sales

Role - Sales

Create Roles

User - Niklaus

User - Kol

Create Users

Permission set -

Permission\_Platform\_1

## 5. Flows

Create Order Confirmation Email

Create Stock Alert Email (Record-Triggered)

Create a Scheduled Flow

## 6. Automation using apex

Create Apex Class

## Created Components:

### HandsMen Customer

The screenshot shows the 'HandsMen Customers' section with a 'Recently Viewed' tab selected. The list contains one item, 'john', with a checkbox and a dropdown arrow. The interface includes a search bar, navigation tabs, and action buttons like 'New', 'Import', 'Change Owner', and 'Assign Label'.

HandsMen Customers

Recently Viewed

1 item • Updated 10 minutes ago

Search this list...

| <input type="checkbox"/>   | HandsMen Customer Name |  |
|----------------------------|------------------------|--|
| 1 <input type="checkbox"/> | john                   |  |

The screenshot shows the 'New HandsMen Customer' form. It includes fields for 'HandsMen Customer Name', 'Email', 'Phone', 'Loyalty Status', 'FirstName', and 'LastName'. There is also a section for 'Owner' showing 'Julie Anne De Los Reyes'. The form has 'Cancel', 'Save & New', and 'Save' buttons.

New HandsMen Customer

\* = Required Information

Information

\* HandsMen Customer Name

Owner

Julie Anne De Los Reyes

Email

Phone

Loyalty Status


--None--

FirstName

LastName

Cancel Save & New Save

# HandsMen Order



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HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

HandsMen Orders

Recently Viewed

New

Import

Change Owner

Assign Label

3 items • Updated a few seconds ago

HandsMen Threads

HandsMen Orders

Recently Viewed

3 items • Updated a few seconds ago

|   | <input type="checkbox"/> HandsMen OrderNumber |  |
|---|---|--|
| 1 | <input type="checkbox"/> O-0003               |  |
| 2 | <input type="checkbox"/> O-0002               |  |
| 3 | <input type="checkbox"/> O-0001               |  |

New HandsMen Order

\* = Required Information

Information

HandsMen OrderNumber

HandsMen Product

HandsMen Customer

Status

Quantity

Total Amount

Owner

Julie Anne De Los Reyes

--None--

Cancel

Save & New

Save

# HandsMen Products

HandsMen Threads

HandsMen Customers

HandsMen Orders

**HandsMen Products**

Inventories

Marketing Campaigns

Reports

More

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Download

Print

Filter

HandsMen Product Name

1

T-shirt cloth

New HandsMen Product

\* = Required Information

Information

\* HandsMen Product Name

SKU

Price

Stock Quantity

Owner


Julie Anne De Los Reyes

Cancel

Save & New

Save

# Inventories



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HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Inventories

Recently Viewed

NewImportAssign Label

1 item • Updated a few seconds ago

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| <input type="checkbox"/> | Inventory Number                |  |
|--------------------------|---------------------------------|--|
| 1                        | <input type="checkbox"/> I-0001 |  |

×

New Inventory

\* = Required Information

Information

Inventory Number

\* HandsMen Product

Stock Quantity

Warehouse


Cancel

Save & New

Save



# Marketing Campaigns



Search...

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HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Marketing Campaigns

📧 Recently Viewed

📌

0 items • Updated a few seconds ago

Search this list...

⚙️

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📅

✎

🗑️

🔍



Nothing to see here

Search...

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🔔

👤

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Marketing Campaigns

📧 Recently Viewed

📌

0 items • Updated a few seconds ago

Search this list...

⚙️

📊

🔄

📅

✎

🗑️

🔍

New Marketing Campaign

\* = Required Information

Information

Marketing Campaign Number

Owner

HandsMen Customer

Search HandsMen Customers...

Start Date

End Date

Cancel

Save & New

Save

Julie Anne De Los Reyes

The creation of the Salesforce CRM system for HandsMen Threads shows how cloud-based technology can modernize and simplify business processes in the men's fashion industry. Through custom objects, automated workflows, and secure data handling, the project successfully integrated sales, inventory, and marketing activities into a single, streamlined platform.

The system now enables the business to manage customer relationships, monitor orders, oversee inventory, and run marketing efforts with improved speed and accuracy. Automated features such as order updates, low-stock alerts, and scheduled data processing help reduce manual tasks, allowing the company to focus more on customer service and expanding its operations.

Because Salesforce is highly scalable, the system is well-equipped to support future growth while maintaining strong reliability and security. Overall, this project demonstrates that using CRM technology strategically can significantly boost business efficiency, enhance customer experiences, and support long-term success for a modern fashion brand like HandsMen Threads.