

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.

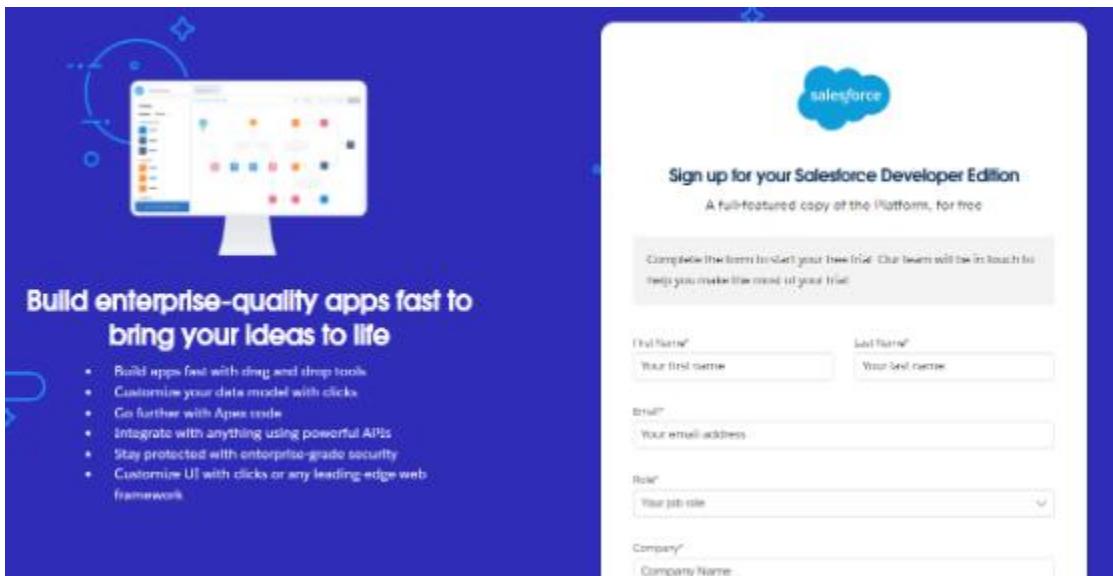
The build leverages key Salesforce features such as Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex. These tools enable process automation, real-time notifications, and deeper customization. Apex, Salesforce's programming language, was especially 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)

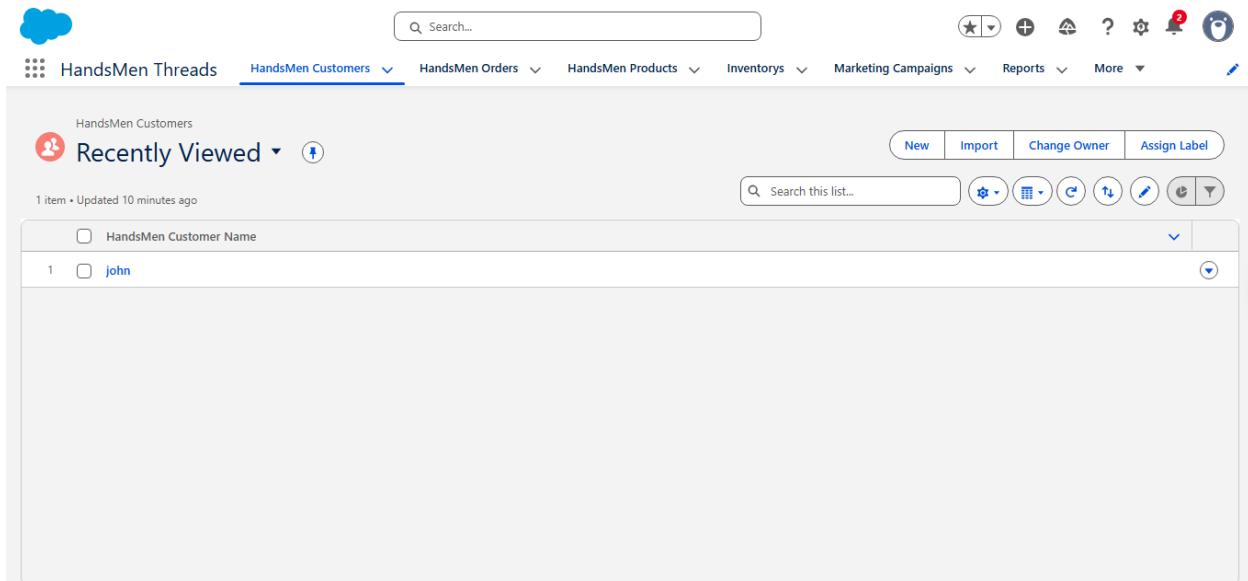
Create a Scheduled Flow

6. Automation using apex

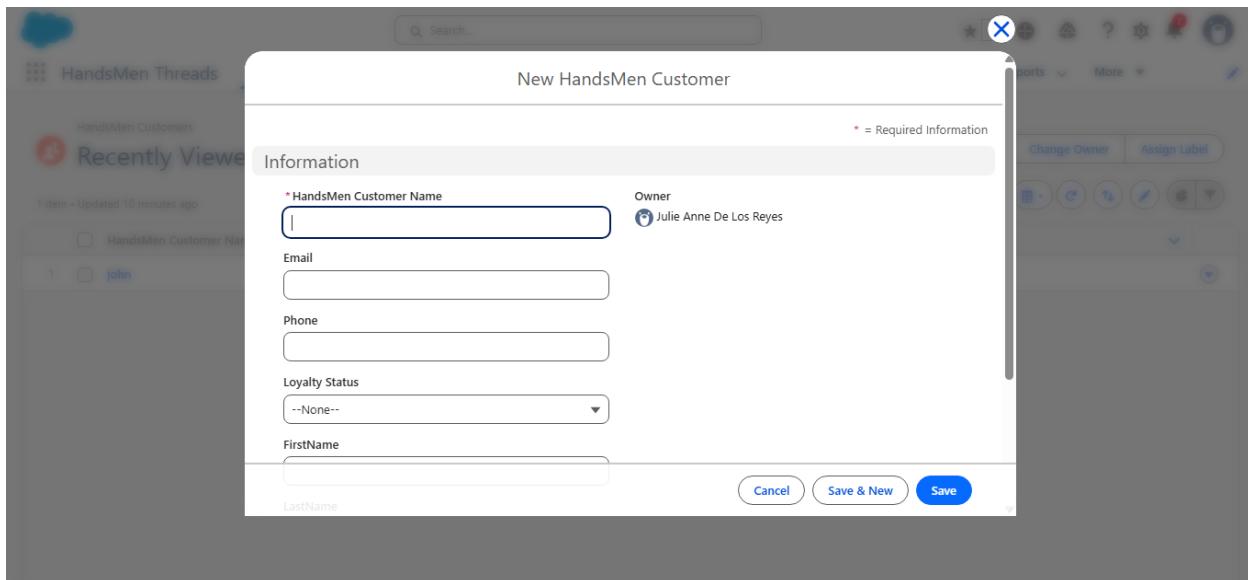
Create Apex Class

Created Components:

HandsMen Customer



The screenshot shows a list view titled "HandsMen Customers". A single item, "john", is listed under "HandsMen Customer Name". The interface includes a search bar at the top, a toolbar with various icons, and a "Recently Viewed" section.



The screenshot shows a modal dialog titled "New HandsMen Customer". It contains a form with the following fields:

- * HandsMen Customer Name: An input field containing the placeholder text " | ".
- Email: An empty input field.
- Phone: An empty input field.
- Loyalty Status: A dropdown menu set to "-None--".
- FirstName: An empty input field.
- LastName: An empty input field.

The form also displays the owner information: "Owner Julie Anne De Los Reyes". At the bottom are three buttons: "Cancel", "Save & New", and "Save".

HandsMen Order

The screenshot shows the HandsMen Orders list view. At the top, there's a navigation bar with links for HandsMen Threads, HandsMen Customers, HandsMen Orders (which is the active tab), HandsMen Products, Inventory, Marketing Campaigns, Reports, and More. Below the navigation is a search bar and a toolbar with various icons. The main area displays a list titled "Recently Viewed" with 3 items updated a few seconds ago. The list includes columns for a checkbox, HandsMen OrderNumber, and a preview. The items listed are O-0003, O-0002, and O-0001.

The screenshot shows the "New HandsMen Order" form. The title bar says "New HandsMen Order". A note indicates "* = Required Information". The form has several sections: "Information" (containing fields for HandsMen OrderNumber, Owner, HandsMen Product, and HandsMen Customer), "Status" (a dropdown menu with "-None-"), "Quantity" (an input field), and "Total Amount" (an input field). At the bottom are "Cancel", "Save & New", and "Save" buttons.

HandsMen Products

The screenshot shows the HandsMen Products list view. At the top, there is a search bar and a toolbar with various icons. Below the toolbar, a navigation bar includes links for HandsMen Threads, Customers, Orders, Products (which is the active tab), Inventory, Marketing Campaigns, Reports, and More. A "Recently Viewed" section shows a single item: "T-shirt cloth". On the right side of the list view, there are buttons for New, Import, Change Owner, and Assign Label, along with a search bar and a set of icons for filtering and sorting.

The screenshot shows the "New HandsMen Product" dialog box. The title bar says "New HandsMen Product" and includes a close button. Below the title, there is a note: "* = Required Information". The main area is titled "Information" and contains the following fields: "HandsMen Product Name" (with a required indicator *), "Owner" (set to Julie Anne De Los Reyes), "SKU" (empty), "Price" (empty), and "Stock Quantity" (empty). At the bottom of the dialog are three buttons: "Cancel", "Save & New", and "Save". The background shows the same HandsMen Products interface as the first screenshot, with the "T-shirt cloth" item visible in the list.

Inventoryst

The screenshot shows the inventory management interface for 'HandsMen Threads'. At the top, there's a navigation bar with links for 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventory' (which is underlined to indicate it's the active tab), 'Marketing Campaigns', 'Reports', and 'More'. Below the navigation is a search bar labeled 'Search...' and a toolbar with various icons for actions like 'New', 'Import', and 'Assign Label'. A 'Recently Viewed' section is displayed, showing a single item: 'I-0001' with a checked checkbox. There's also a 'Search this list...' field and a set of filter and sort buttons.

A modal dialog box titled 'New Inventory' is open over the main inventory list. It has a header with a close button ('X') and a note that '*' = Required Information. The dialog is divided into sections: 'Information' (which is currently selected), 'Stock Quantity', and 'Warehouse'. The 'Information' section contains fields for 'Inventory Number' (with a dropdown placeholder 'HandsMen Product' and a search input 'Search HandsMen Products...'), 'Stock Quantity' (an empty input field), and 'Warehouse' (an empty input field). At the bottom of the dialog are three buttons: 'Cancel', 'Save & New', and 'Save'.

Marketing Campaigns

The screenshot shows a software application interface for managing marketing campaigns. At the top, there is a navigation bar with links for HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns (which is the active tab), Reports, and More. A search bar and various system icons are also present.

The main area displays a "Recently Viewed" section with a message indicating "0 items - Updated a few seconds ago". Below this is a decorative illustration of a landscape with mountains, clouds, and birds. A placeholder text "Nothing to see here." is visible at the bottom of the main content area.

A modal dialog box titled "New Marketing Campaign" is open in the center. It contains a form with the following fields:

- Information** (Section header)
- Marketing Campaign Number**: An input field with a placeholder "Search HandsMen Customers..." and a magnifying glass icon.
- Owner**: A user profile card for "Julie Anne De Los Reyes".
- HandsMen Customer**: A search input field with the same placeholder as the Marketing Campaign Number field.
- Start Date**: An input field with a calendar icon.
- End Date**: An input field with a calendar icon.

At the bottom of the dialog are three buttons: "Cancel", "Save & New", and "Save".

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.