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

Prepared by: Minette Joy Lorzano
School: Polytechnic University of the Philippines

Project Overview

This project focuses on building a tailored Salesforce CRM for HandsMen Threads, a forward-thinking men's fashion brand. Its main goal is to streamline data management, strengthen customer relationships, and unify operations on a reliable platform. A robust data model and strict UI validations ensure accuracy, while custom objects for Customers, Orders, Products, Inventory, and Campaigns integrate seamlessly. Business processes are automated through flows, email alerts, and Apex code to handle confirmations, loyalty updates, and stock notifications. Data integrity is reinforced with validation rules and role-based access for Sales, Inventory, and Marketing teams. A scheduled Apex batch also monitors low stock for proactive replenishment. Overall, this CRM enhances customer engagement, optimizes workflows, and equips HandsMen Threads with a scalable, future-ready system within Salesforce.

Objectives

The Salesforce CRM for HandsMen Threads aims to create a unified platform that manages sales, inventory, marketing, and customer service data. Centralized validation and controlled access ensure accuracy and reliability, supporting better decisions and smoother operations. Automated processes—such as order confirmations, loyalty updates, and stock monitoring—boost efficiency and agility, while personalized customer communications drive engagement and long-term loyalty. This scalable system not only meets current operational needs but also positions HandsMen Threads for sustained growth, innovation, and measurable value through stronger customer management, streamlined workflows, and optimized inventory control.

Phase 1: Requirement Analysis & Planning

1.1 Understanding Business Requirements

HandsMen Threads needs a centralized CRM to manage sales, inventory, marketing, and customer service.Current challenges include fragmented data, manual processes, and limited visibility across teams.The solution must improve customer engagement, streamline workflows, and support scalable growth in the competitive men’s fashion market.

1.2 Defining Project Scope and Objectives

Scope

- Implement Salesforce CRM customized for HandsMen Threads.
- Integrate core business objects: Customer, Order, Product, Inventory, and Marketing Campaigns.
- Automate key processes (order confirmations, loyalty updates, stock notifications).

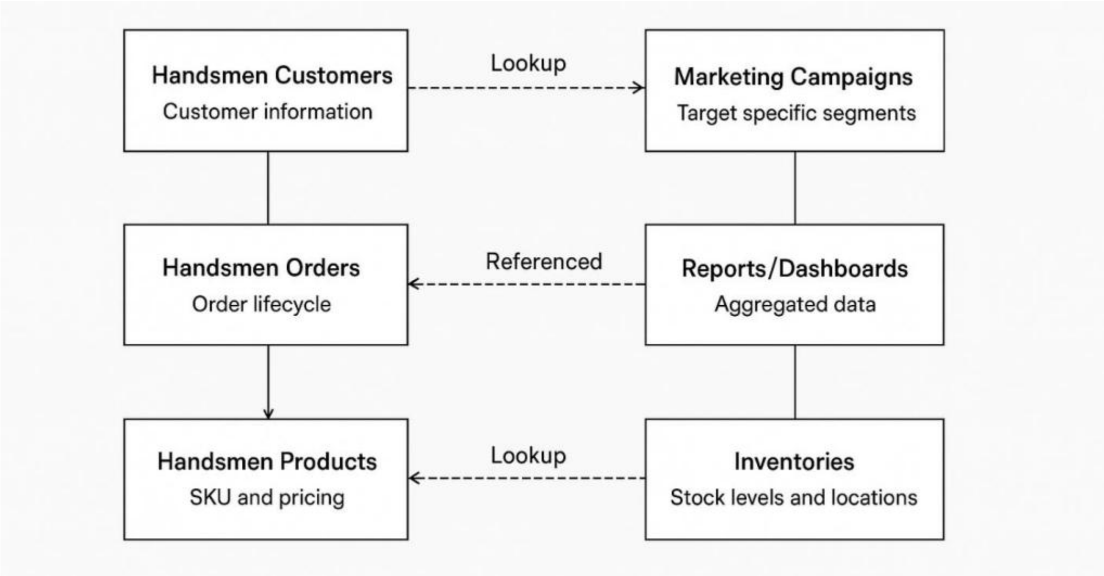
Objectives

- Ensure data accuracy and consistency through validation rules.
- Establish role-based access control for Sales, Inventory, and Marketing teams.
- Enhance customer experience with personalized communications.
- Provide a future-ready, scalable platform for continuous innovation.

1.3 Design Data Model and Security Model

Data Model

Entities: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, Marketing Campaign. Relationships defined to support reporting and analytics.



Security Model:

- Role-based access (Sales, Inventory, Marketing).
- Validation rules to enforce data integrity.
- Scheduled Apex batch for proactive inventory monitoring.

1.4 Stakeholders Mapping

Internal Stakeholders:

- Sales Team - customer acquisition & relationship management.
- Inventory Team - stock monitoring & replenishment.
- Marketing Team - campaign execution & loyalty programs.

External Stakeholders:

- Customers - improved engagement and service.
- Suppliers - streamlined inventory coordination.
- Management - strategic decision-making with reliable data.

1.5 Execution Roadmap

Week 1-2: Requirements gathering and data model design.

Week 3-4: Back-end development and configurations.

Week 5-6: UI/UX customization and testing.

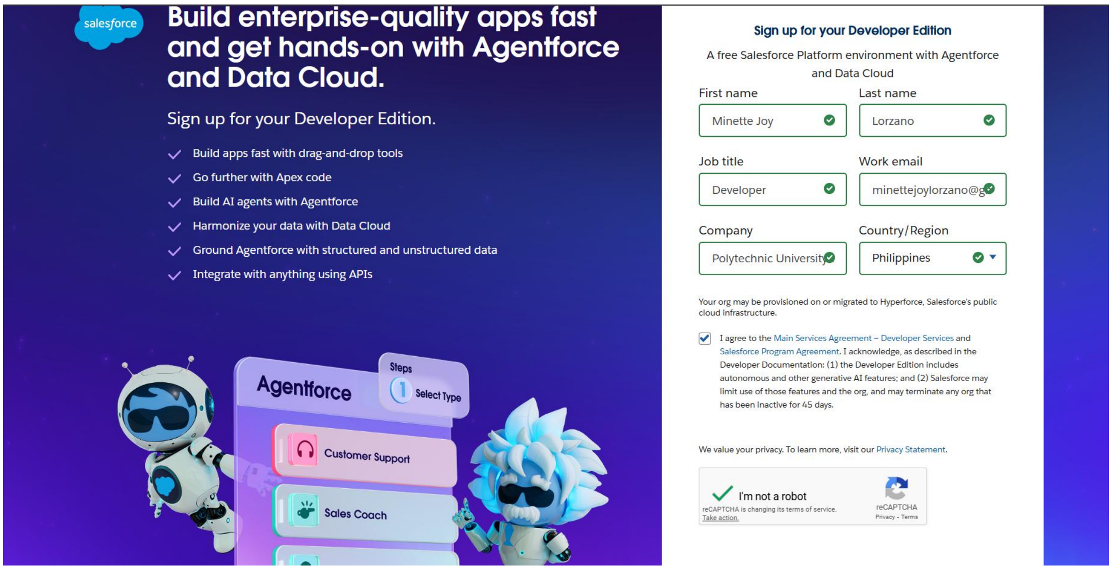
Week 7-8: Data migration, security setup, and deployment.

Ongoing: Maintenance and enhancements.

Phase 2:Salesforce Development - Backend & Configurations

2.1 Setup environment & DevOps workflow

A Salesforce Developer Org was established by registering through developer.salesforce.com/signup. The account was confirmed via email, a password was created, and access to the Salesforce Setup page was successfully enabled.



2.2 Customization of Objects, Fields, Validation Rules, Automation

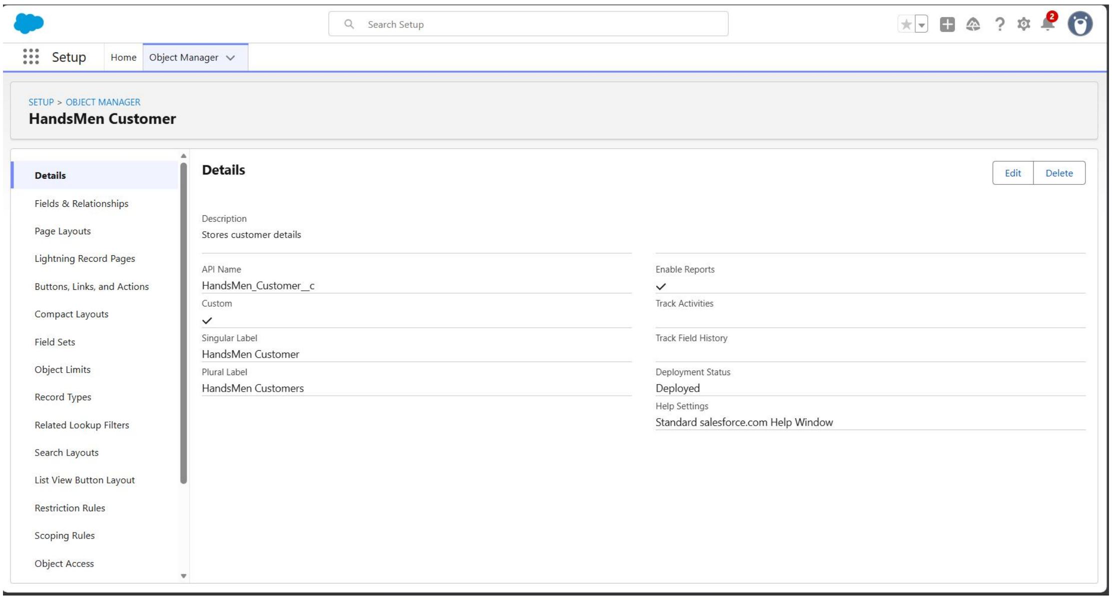
Custom Objects

Five custom objects were developed to manage essential business data within the Salesforce CRM:

- HandsMen Customer – Stores customer information including contact details and loyalty status.
- HandsMen Product – Tracks product attributes such as SKU, pricing, and available stock.
- HandsMen Order – Records customer orders with details like quantity and order status.
- Inventory – Monitors stock levels and warehouse locations for efficient supply management.
- Marketing Campaign – Captures promotional campaign details, schedules, and targeted activities.

Next Steps:

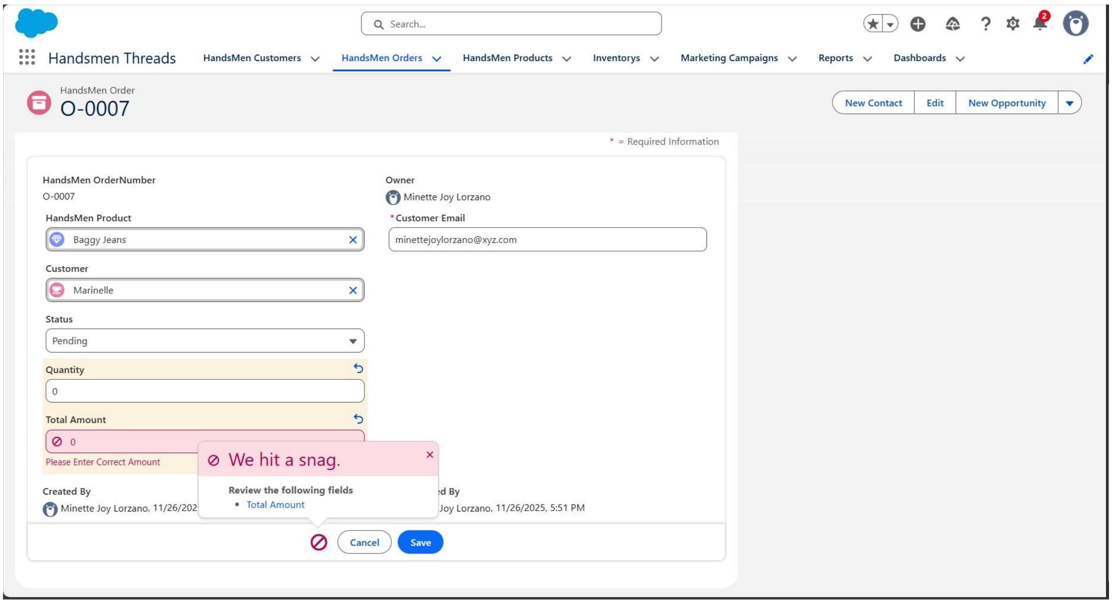
- Navigated to Setup, clicked Object Manager, and selected Create → Custom Object.
- Entered the object label and name, and enabled options for reporting and search functionality.



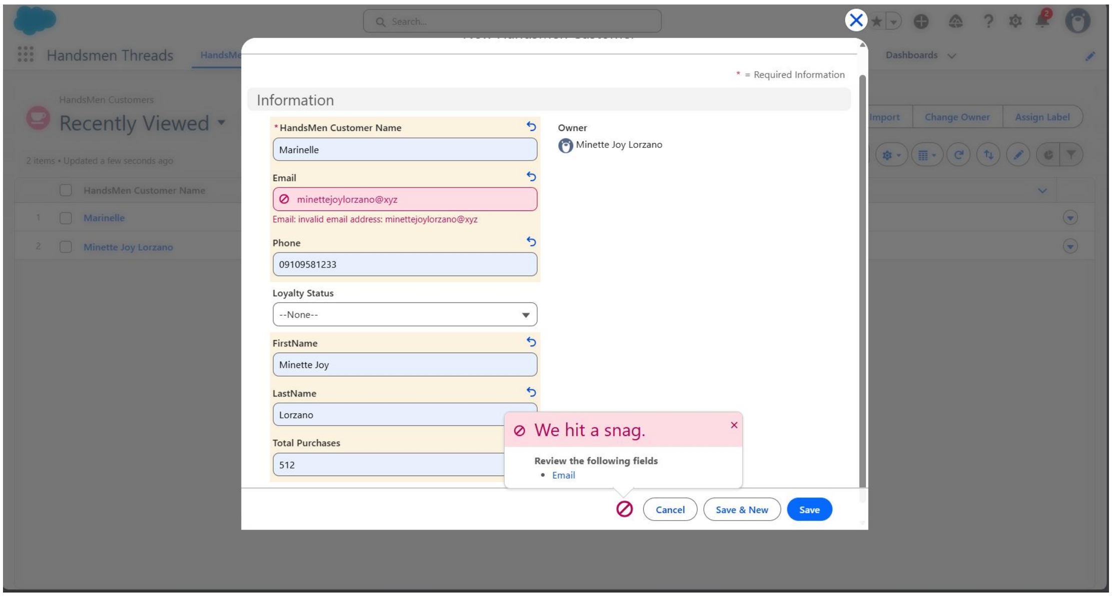
- Saved the custom object

Validation Rules

Order Object: Prevents saving the record if Total_Amount__c <= 0.



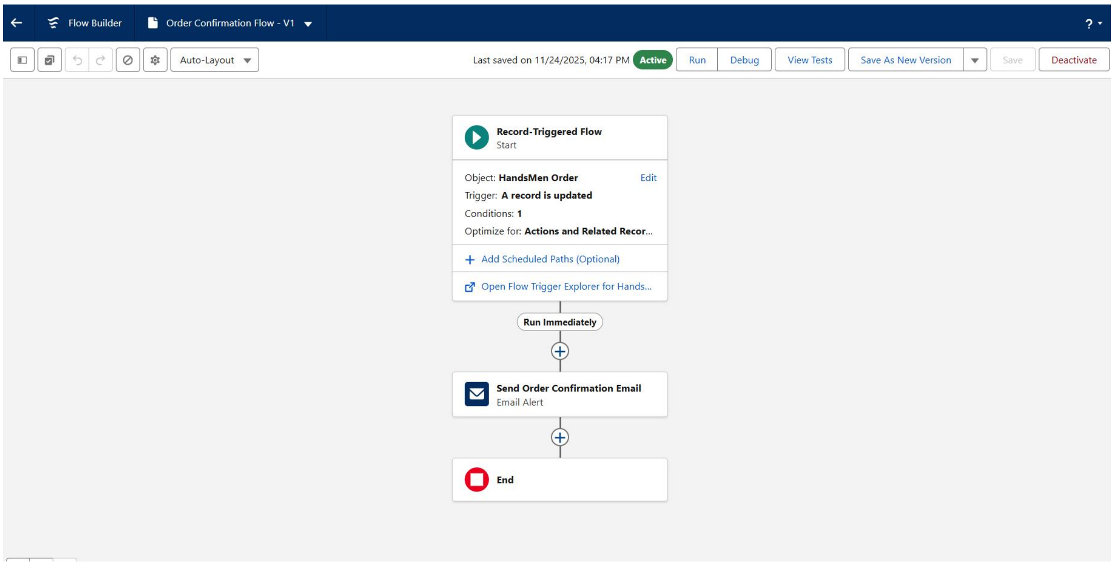
Customer Object: Validates that the email address contains [“@gmail.com”]

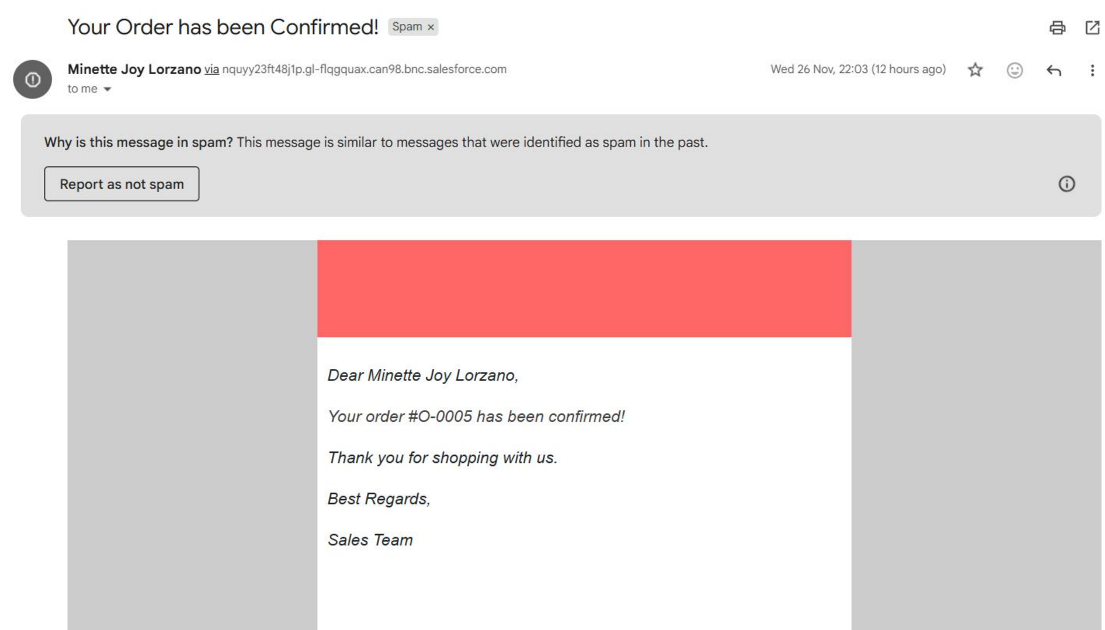


Automation(Flows)

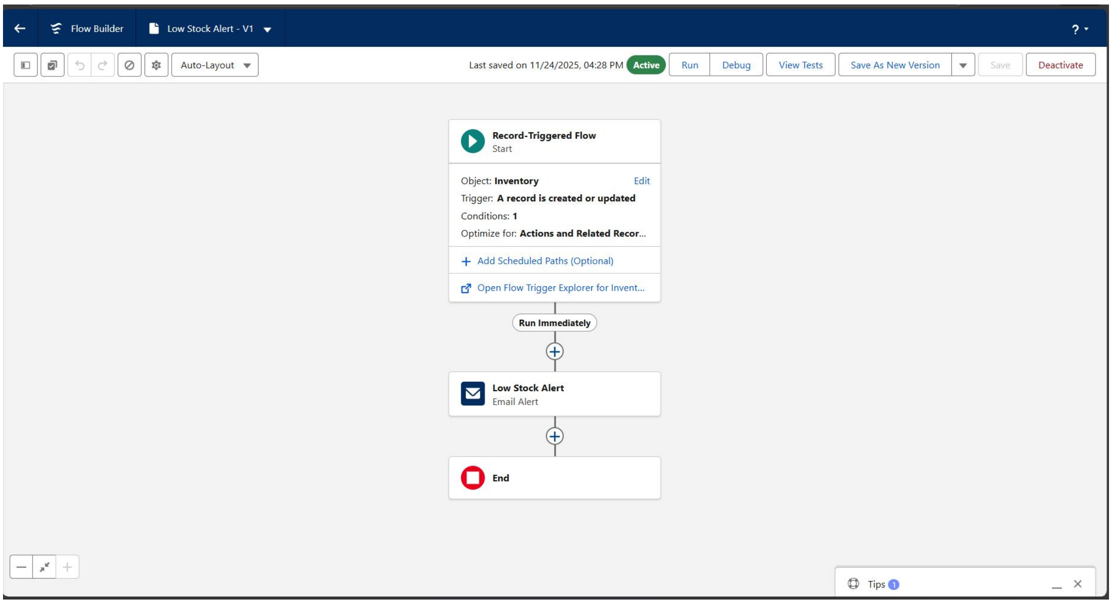
Record Triggered Flows

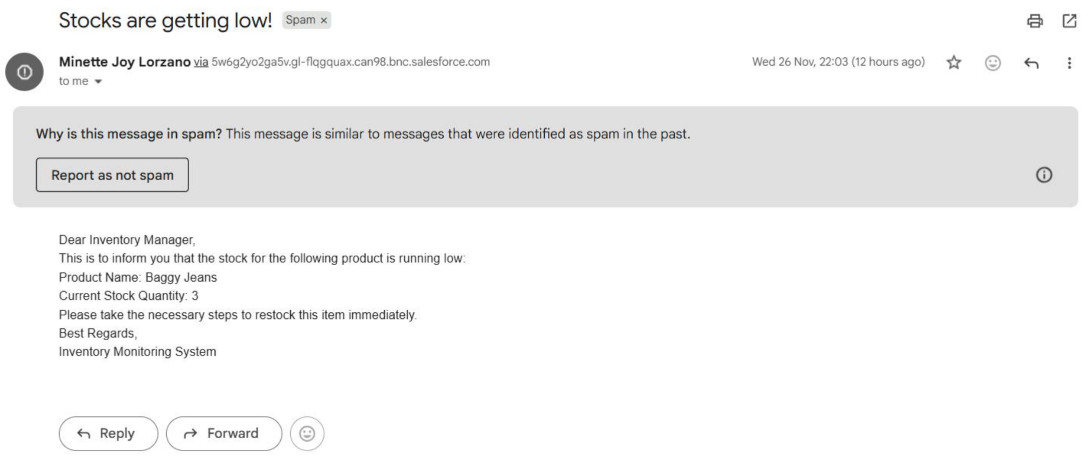
- Order Confirmation Flow





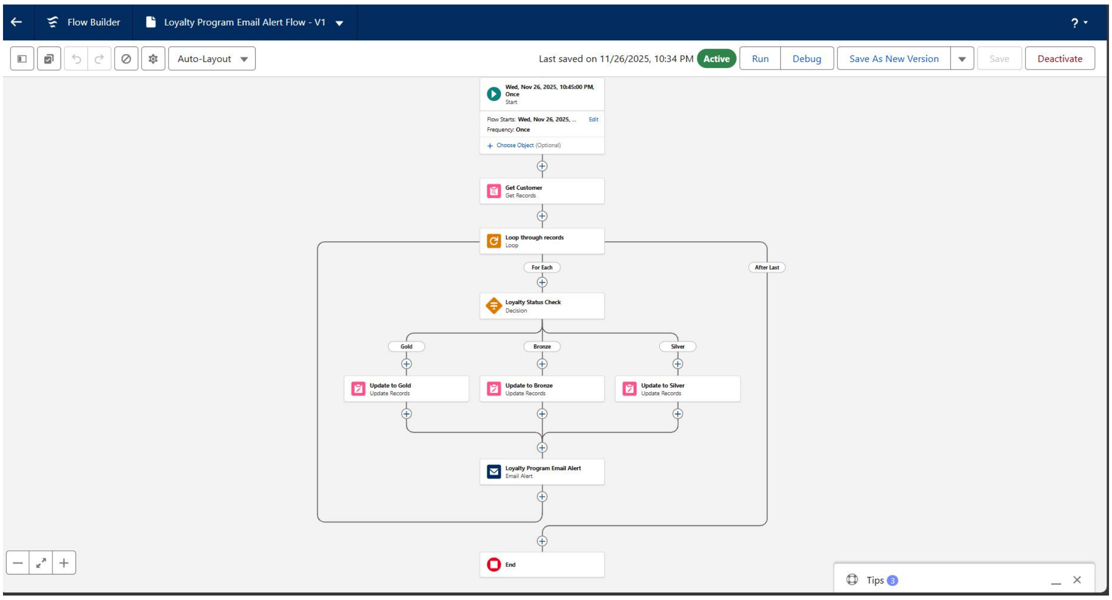
■ Low Stock Alert Flow

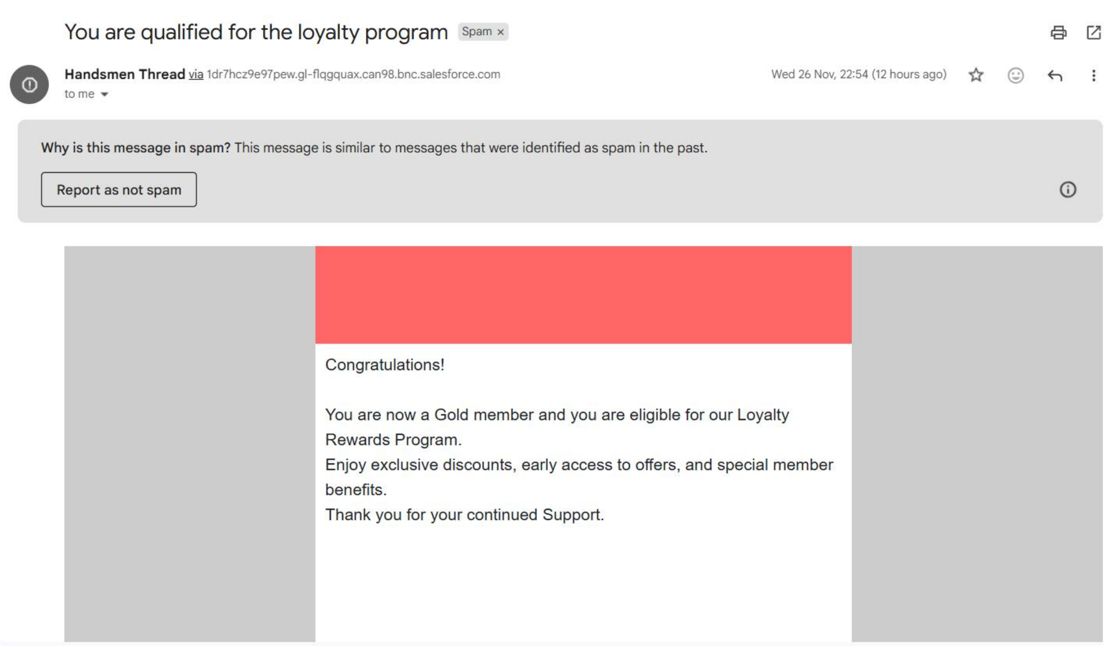




Scheduled-Triggered Flows

- Loyalty Program Flow





2.3 Apex Classes, Triggers, Asynchronous Apex Classes

Apex Classes

- Inventory Batch Job - Runs on a scheduled basis to monitor inventory levels and update stock data, ensuring proactive stock replenishment and accurate inventory tracking.

Apex Class | Version Settings

```
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>();

// Cast SObject list to Product__c list

for (SObject record : records) {

HandsMen_Product__c product = (HandsMen_Product__c) record;

product.Stock_Quantity__c += 50; // Restock logic

productsToUpdate.add(product);

}

if (!productsToUpdate.isEmpty()) {
```

Position: Ln 61, Ch 2 | Total: Ln 61, Ch 1020

Apex Triggers

- Order Total Trigger - Automatically calculates the Total Amount based on the order quantity and unit price.

Apex Trigger | Version Settings

is active

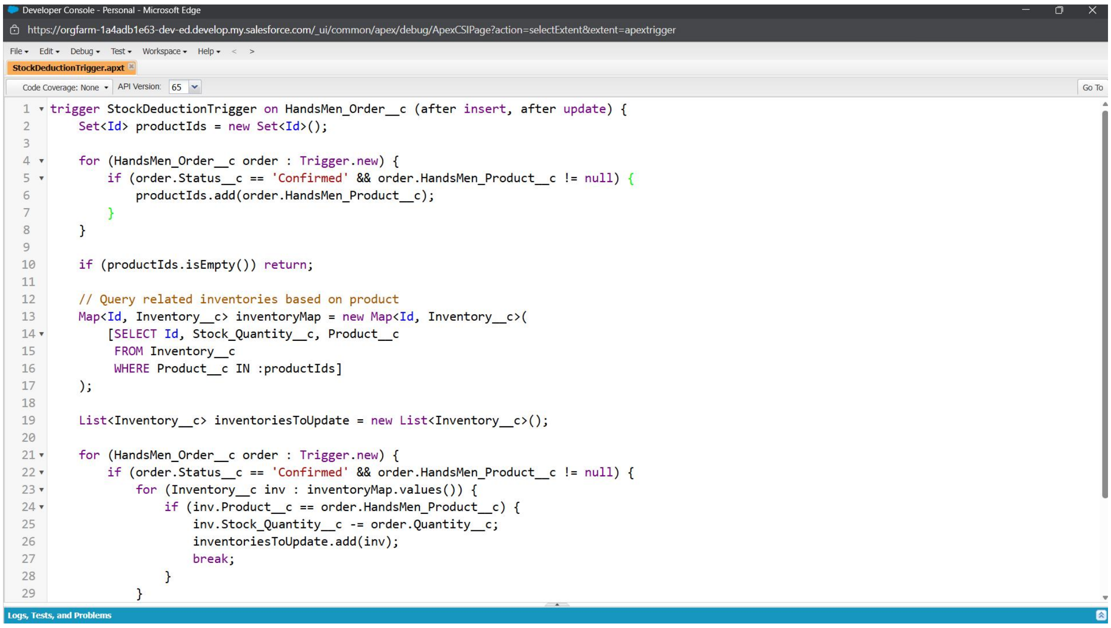
```
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();

    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);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}
```

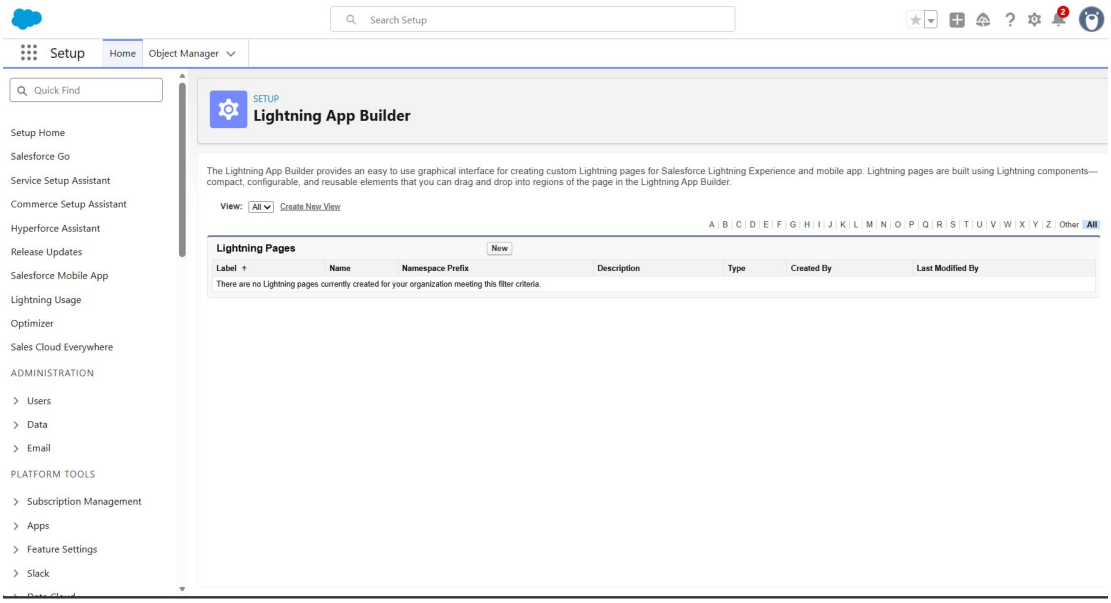
- Stock Deduction Trigger - Automatically deducts inventory stock levels whenever an order is placed and confirmed.



Phase 3:UI/UX Development & Customization

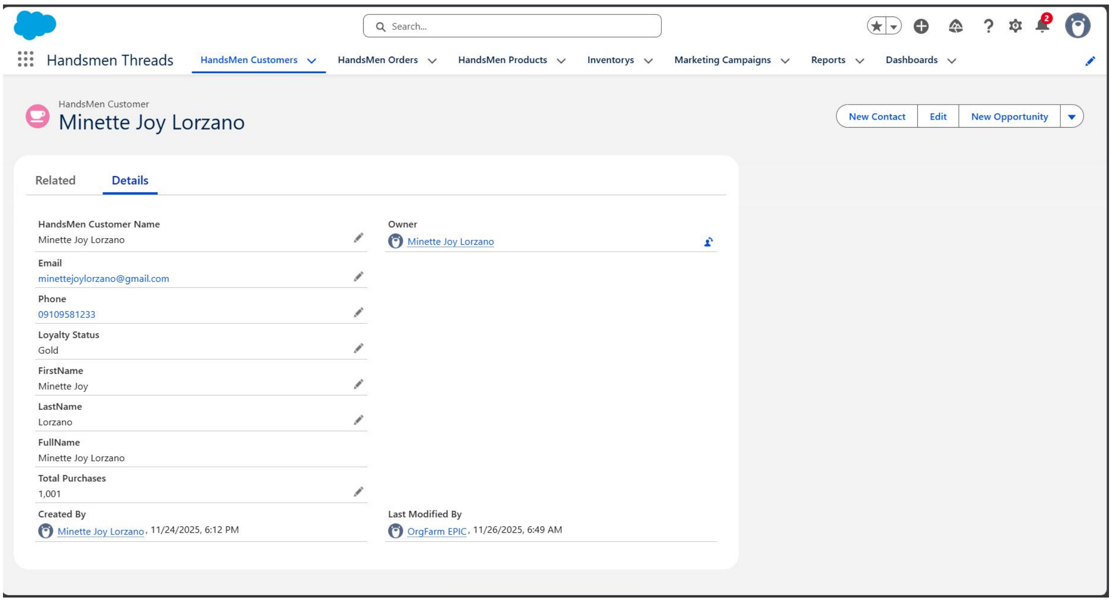
3.1 Lightning App Setup

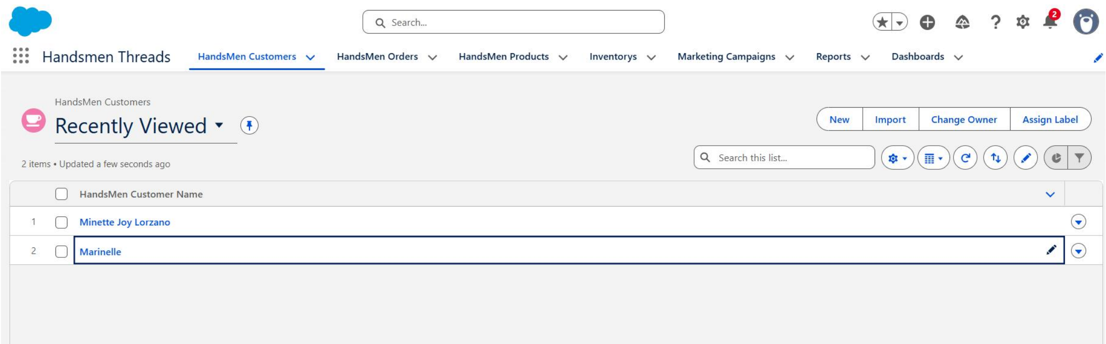
Create and configure a custom Lightning App using Salesforce's App Manager.



3.2 Page Layouts and Dynamic Forms

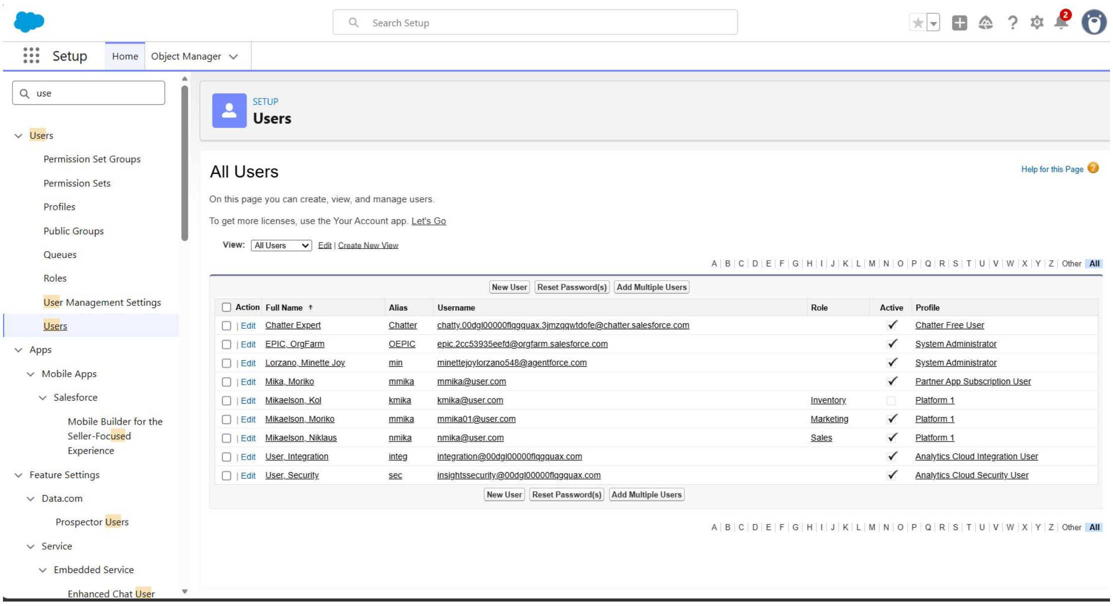
Customized the page layouts for key objects (Customer, Order, Product, Inventory) to streamline data entry and ensure appropriate visibility based on user roles. Implement dynamic forms that adjust fields and sections according to user context, improving both usability and data accuracy.

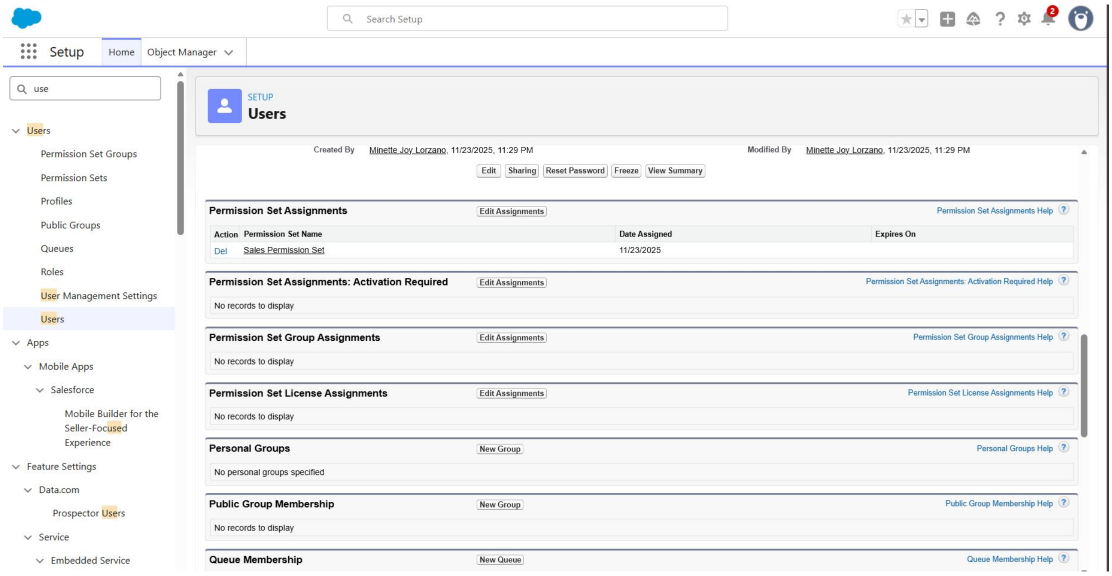




3.3 User Management

User profiles, roles, and permission sets were established to provide controlled access to data and features within the Lightning App, ensuring secure and relevant experiences tailored to each department and responsibility.

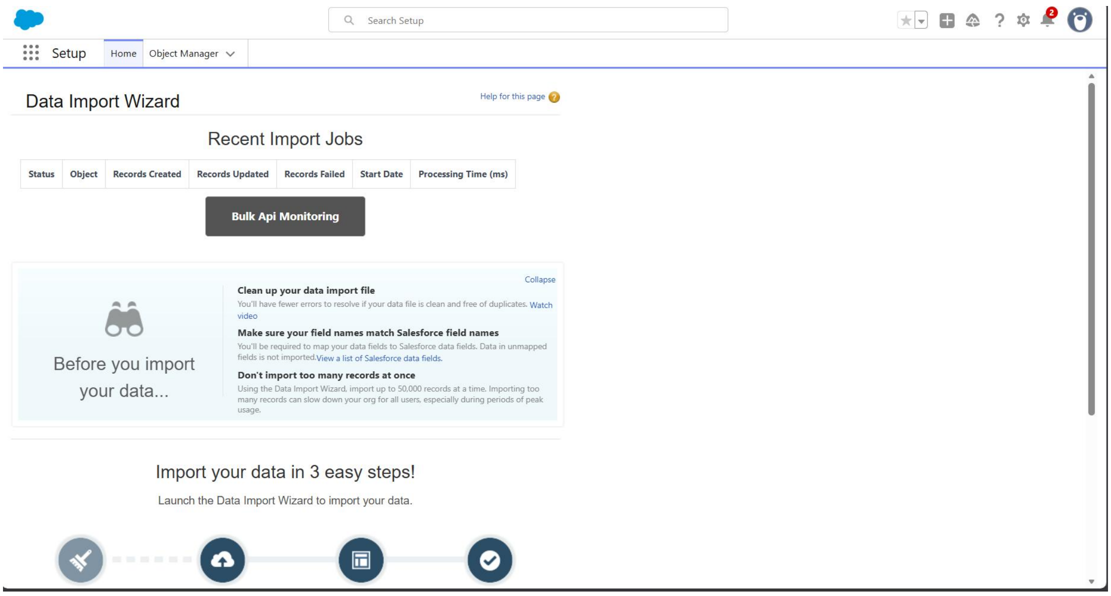




Phase 4:Data Migration, Testing & Security

4.1 Data Loading Process

Existing data—including customers, orders, and inventory—was migrated using the Salesforce Data Import Wizard for smaller datasets and Data Loader for bulk uploads. Prior to migration, data was cleansed and mapped to ensure accuracy and consistency.



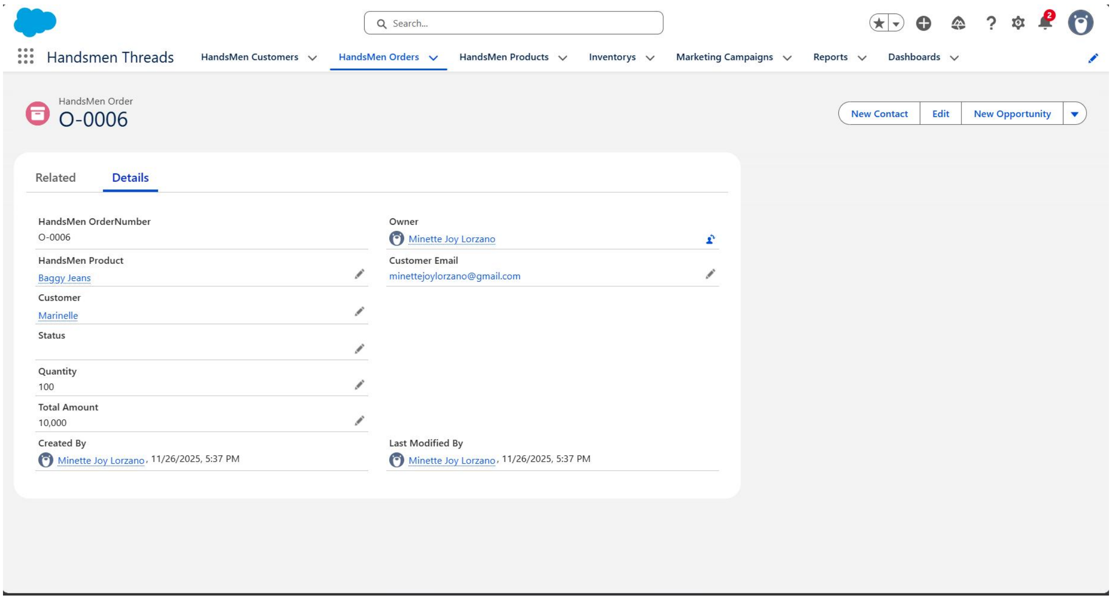
4.2 Field History Tracking, Duplicate Rules, Matching Rules

Tracked Objects & Fields:

HandsMen Orders – Fields tracked: Status, Total Amount

- This object monitors the order lifecycle and financial value.
- Example Scenario: Annie decides to purchase 50 eyeglasses, each priced at $2.
- A new Order record is created in Salesforce that captures all details of her
- purchase.

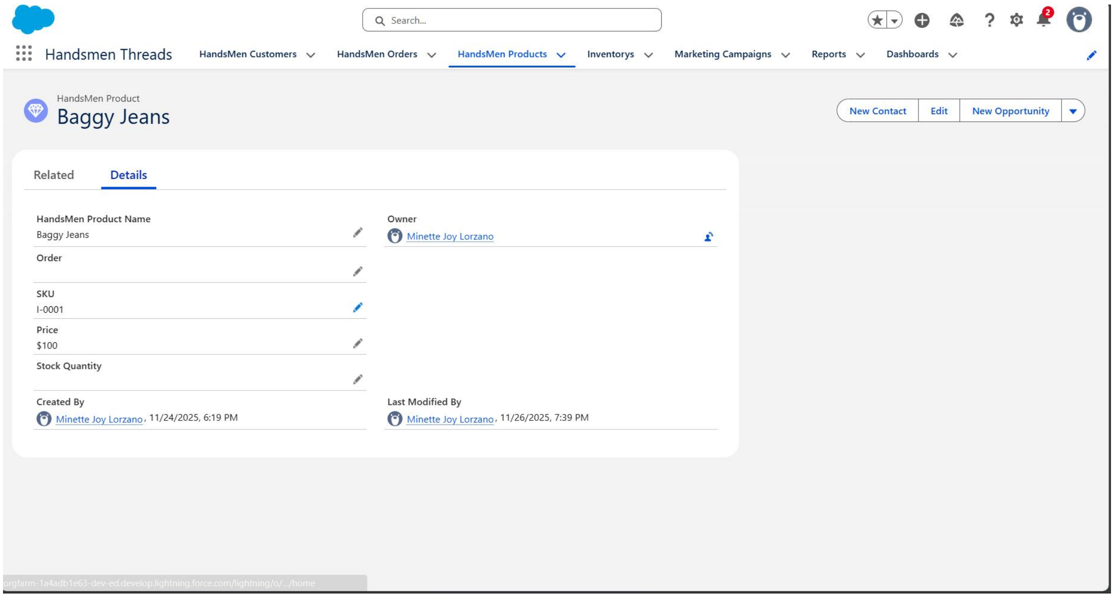
An Apex Trigger automatically calculates the Total Amount, ensuring the computation is consistent and error-free.

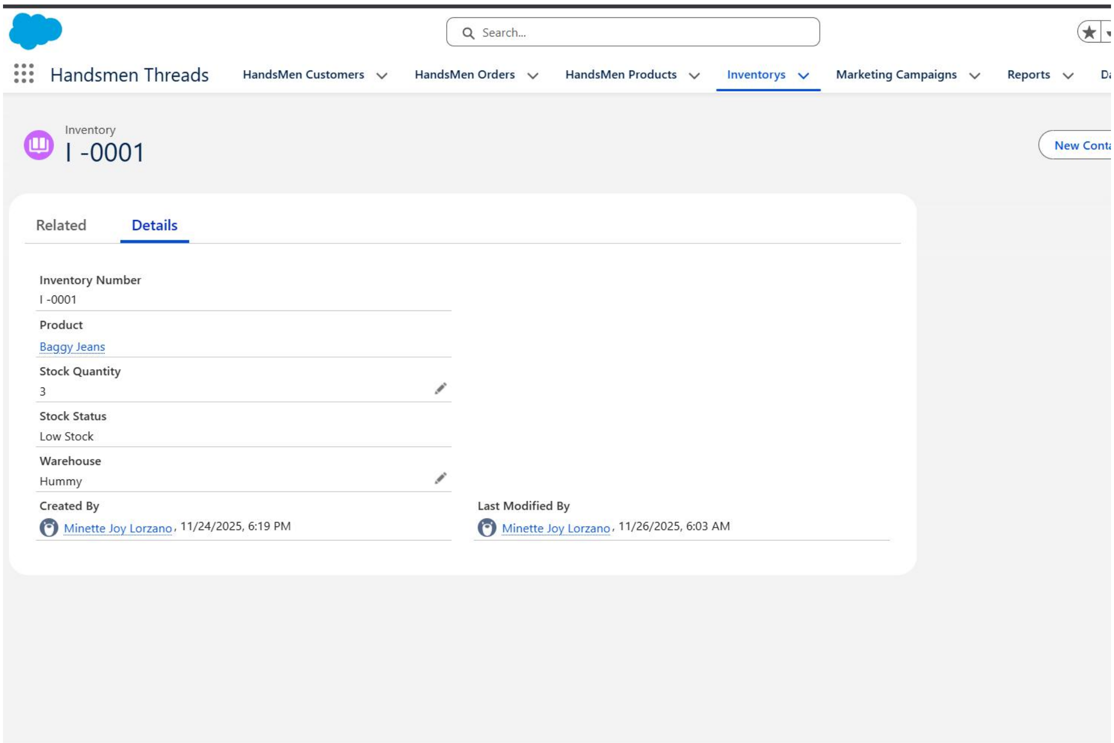


HandsMen Products – Fields Tracked: Price, Quantity

- The admin adds products such as eyeglasses, T-shirts, and other items into the Product__c object.
- Each product record includes key details like price, SKU, and other essential attributes.
- The system monitors pricing updates and stock changes to maintain accuracy.

■ The Inventory object is automatically updated to reflect stock levels for each product, enabling real-time tracking of item availability.





Duplicate and Matching Rules – Implemented to prevent duplicate entries and ensure accurate customer records.

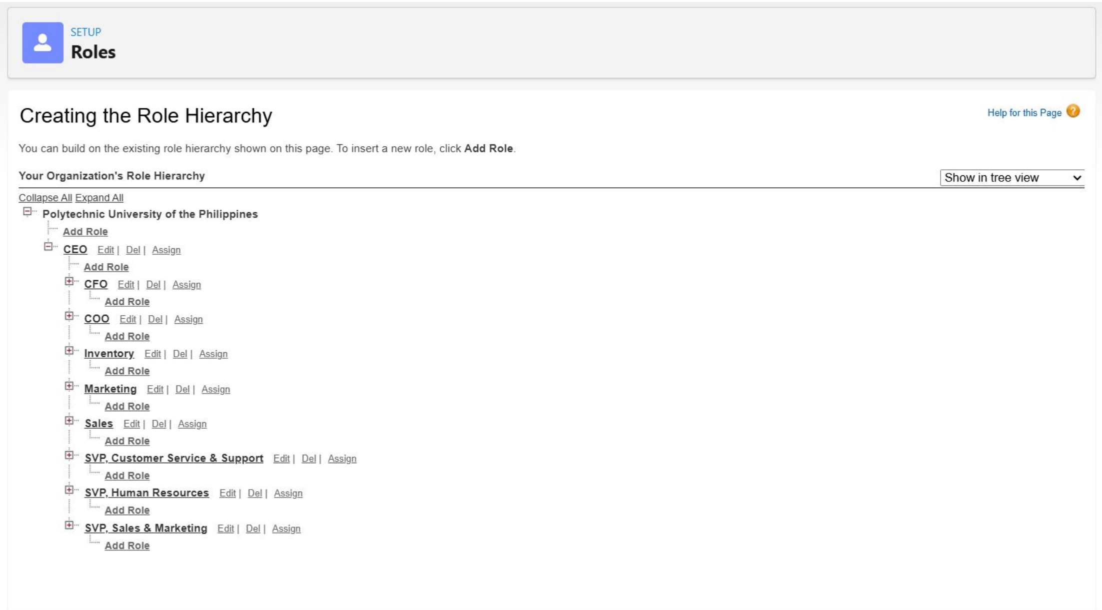
Standard Customer Matching Rule:

■ Compares records based on *First Name*, *Last Name*, and *Email*.

■ Restricts the creation of new customer records if an existing match is found.

4.3 Profiles, roles, role hierarchy, permission sets, and sharing rules

An integrated security model was aligned with the organizational chart, using profiles, roles, permission sets, and sharing rules to ensure proper access, visibility, and editing rights for Sales, Inventory, and Marketing teams.



Phase 5:Deployment, Documentation & Maintenance

5.1 Deployment Strategy

- The system was deployed using Salesforce Change Sets for configuration and metadata migration between environments.
- For larger or complex updates, Salesforce CLI and DevOps tools were utilized to ensure smooth, controlled releases.
- Deployment followed a staged approach: development → testing → production, with validation at each step to minimize risks.

5.2 System Maintenance & Monitoring

- Regular monitoring of system performance, data integrity, and automation workflows was established.
- Scheduled Apex jobs track inventory levels and ensure proactive replenishment.

- User feedback loops and periodic audits help identify areas for improvement.
- Security updates and role-based access reviews are conducted to maintain compliance and safeguard data.

5.3 Troubleshooting Approach

- Issues are logged and categorized by severity in a centralized tracking system.
- Common problems (e.g., validation errors, automation failures) are addressed through predefined troubleshooting guides.
- Escalation procedures ensure critical issues are resolved promptly, with rollback plans available if needed.
- Documentation of fixes and resolutions is maintained for future reference and knowledge sharing.

Conclusion

The Salesforce CRM implementation for HandsMen Threads successfully delivered a scalable, secure, and automated platform tailored to the company's needs. By consolidating customer, order, product, inventory, and marketing data into a unified system, the project enhanced customer engagement, streamlined workflows, and improved decision-making. Automation and role-based access controls strengthened efficiency and security, while proactive monitoring ensured operational reliability.

This capstone demonstrates how a well-designed Salesforce CRM can transform business operations, positioning HandsMen Threads for sustained growth, innovation, and competitive advantage in the men's fashion industry.