



Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON CAMPUS
Bachelor of Science in Information Technology

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

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BSIT-3

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ABSTRACT

The proposed project is a complete Salesforce CRM that was designed to work with HandsMen Threads, which is a high-end men fashion and men tailoring company. The key points of the system are to simplify the business processes, improve the interaction with customers, and increase the reliability of the data in various departments.

Five major custom objects, Customer, Order, Product, Inventory and Marketing Campaign were used in designing a comprehensive data model to handle information that is critical to the business. Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers were used to automate business processes to aid in confirming orders, computing loyalty status, and proactive management of stock.

Sales, Inventory and Marketing teams were set up with validation rules and role based security model to keep a check on data integrity/sensitive data. There is a planned Apex batch job that also deals with automated stock tracking.

Overall, this CRM solution would greatly enhance customer experience in terms of personal communication, operational efficiency due to automation, and scalability to facilitate further development of HandsMen Threads in Salesforce platform.

OBJECTIVE

This project aims at designing and deploying a customized Salesforce CRM, which will centralize the customer, order, inventory, products and marketing activities of HandsMen Threads. The purposes of this system are to simplify everyday business processes and advance quality, efficient and customer-oriented operations.

The CRM is planned to accomplish the following:

- Automate key business functions like order verifications, loyalty programs, inventory alerts and communication triggers.
- Ensure proper and standard records by the validation rules and structured data entry.
- Improve interdepartmental coordination with role-based access, where each team works on the right privileges.
- Enhance the interaction with the customers with targeted emails and automated loyalty programs.
- Offer time-sensitive access to inventory, customer relations and sales to make informed decisions.



TECHNOLOGY DESCRIPTION

Salesforce Platform

Salesforce is a cloud-based CRM platform enabling organizations to manage customer data, automate business processes, and support sales, marketing, and service operations. It includes both declarative (click-based) and programmatic (Apex-based) tools for custom process development.

Custom Objects

Custom Objects store unique business data. They function similarly to database tables.
Examples:

- **Customer__c** – Customer information such as name, contact details, and loyalty status
- **Product__c** – Product details including price, SKU, and category
- **Order__c** – Order information such as quantity, price, and status
- **Inventory__c** – Stock levels and warehouse locations
- **Marketing_Campaign__c** – Campaign schedules and promotional activities

Tabs

Tabs provide easy navigation to view and manage records for each custom object.

Custom App

A Salesforce Lightning App groups tabs and tools used for the HandsMen Threads CRM, allowing users to access all relevant objects in one workspace.

Profiles

Profiles define user permissions such as object access, field visibility, and system capabilities.

Roles

Roles control hierarchical data visibility and determine which records users can view or manage.

Permission Sets

Permission Sets grant additional access to users without changing their assigned profile.

Validation Rules



Validation Rules enforce correct data entry and ensure compliance with business requirements.

Examples:

- Email must contain "@gmail.com"
- Stock quantity must not drop below zero

Email Templates & Alerts

Predefined email templates are used for automated messaging such as order confirmations and loyalty updates. Email Alerts trigger these templates through flows or automation.

Flows

Flows automate business logic such as sending emails, updating records, and validating conditions.

Example: Send order confirmation email upon new order creation.

Apex

Apex is Salesforce's programming language used for creating complex business logic.

Examples:

- Trigger to update Total Amount on orders
- Trigger to adjust inventory stock
- Trigger to compute customer loyalty status

DETAILED EXECUTION OF PROJECT PHASES

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

Analyzed operational needs of HandsMen Threads including customer tracking, order processing, personalized communication, and inventory monitoring.

Defining Project Scope & Objectives

Defined CRM modules covering customers, products, inventory, orders, and marketing.

Data Model & Security Model Design

Prepared custom objects, fields, relationships, validation rules, and security components including profiles, roles, and permission sets.



Stakeholder Mapping

Identified key stakeholder groups: Sales Team, Inventory Manager, Marketing Department, and System Administrator.

Execution Roadmap

Planned sequential development from data modeling → backend automation → UI customization → testing → deployment.

Phase 2: Salesforce Development — Backend & Configurations

Environment Setup

Created a Salesforce Developer Org and configured initial admin settings.

Custom Objects, Fields & Validation Rules

Developed five custom objects and relevant fields. Applied validation rules for email format and total amount checks.

Automation Tools (Flows, Processes, Approvals)

- Record-Triggered Flows for order confirmation, loyalty updates.
- Scheduled Flows for periodic stock alerts.
- Email Alerts for customer notifications.

Apex Development

- **Order Total Trigger** – Calculates total order amount based on quantity and unit price.
- **Stock Update Trigger** – Deducts product stock when an order is placed.
- **Loyalty Status Trigger** – Automatically updates customer loyalty tier based on lifetime purchase amount.

Screenshots:



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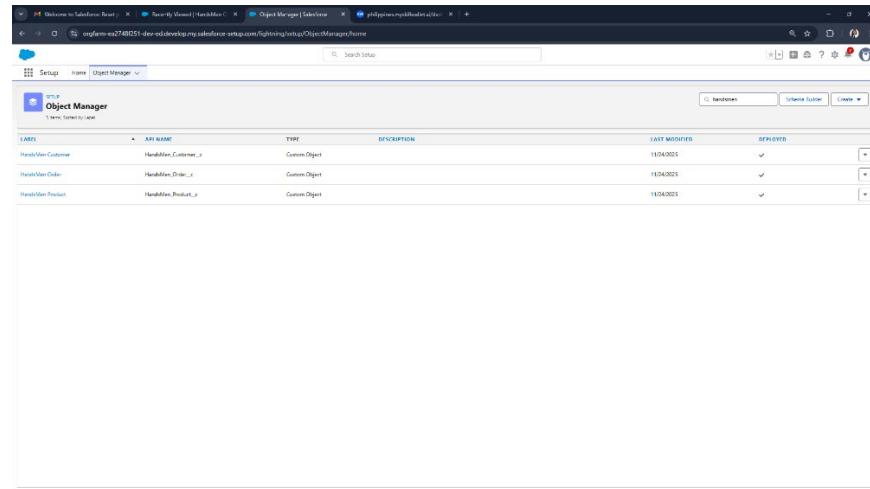


Fig. 1 Created Objects

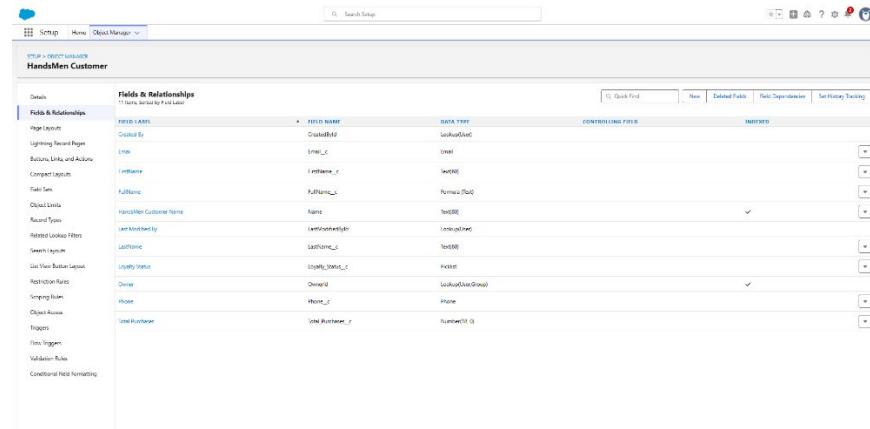


Fig. 2 Fields in Handsmen Customer

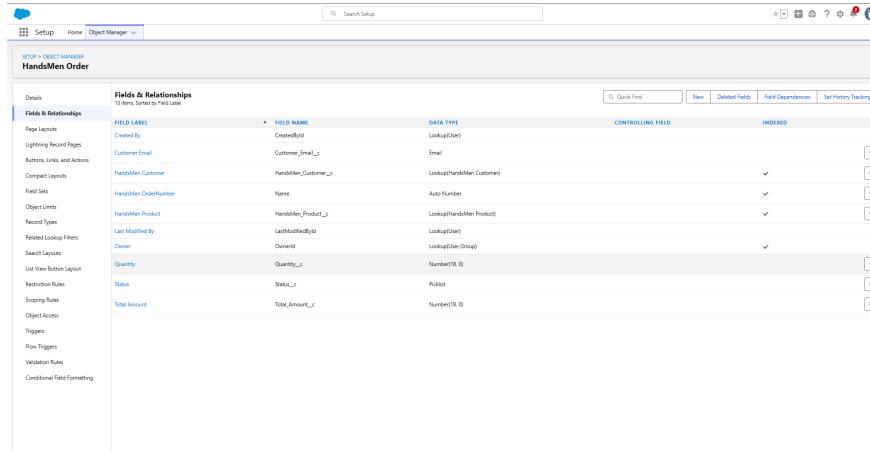


Fig. 3 Fields in Handsmen Order



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

Fig. 4 Fields in Handsmen Product

Validation Rule Detail

Rule Name	Validation Formula	Error Message	Description	Created By	Active	Error Location	Modified By
	NOT CONTAINS(Email__c, "@gmail.com")	Please Enter Email		Erika.Jason.Tan	11/24/2020, 3:24 AM	Top of Page	Erika.Jason.Tan

Fig. 5 Handsmen Customer Validation Rule

Validation Rule Detail

Rule Name	Validation Formula	Error Message	Description	Created By	Active	Error Location	Modified By
Total_Amount	Total_Amount__c <= 0	Please Enter Correct Amount		Erika.Jason.Tan	11/24/2020, 3:21 AM	Total Amount	Erika.Jason.Tan

Fig 6. Handsmen Order Validation Rule



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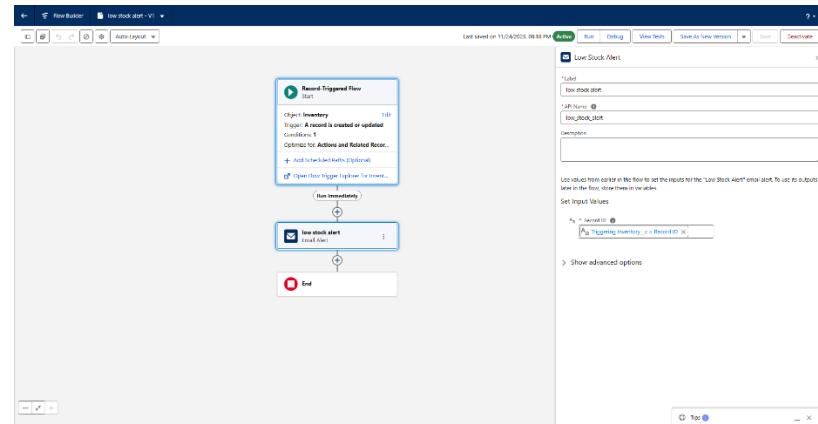


Fig. 7 Low Stock Alert Flow

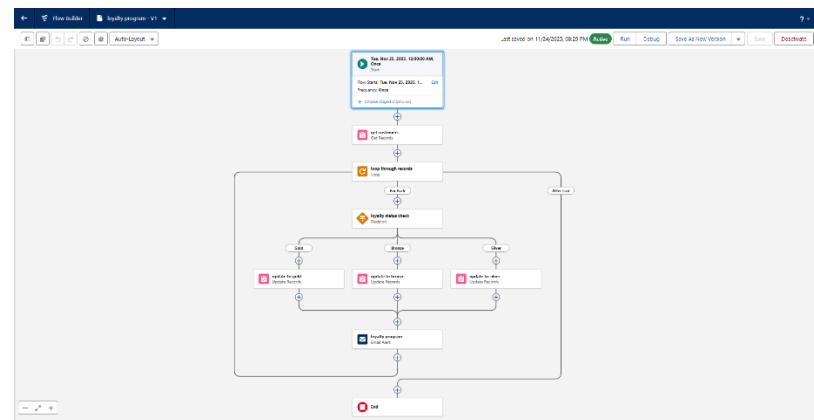


Fig. 8 Loyalty Program Flow

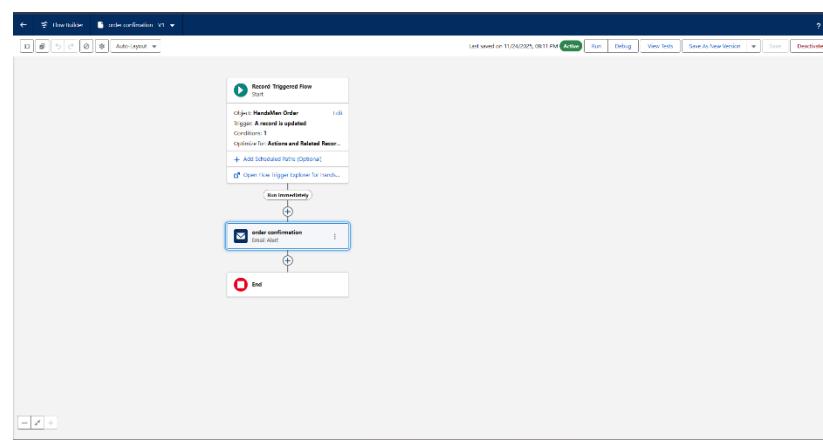
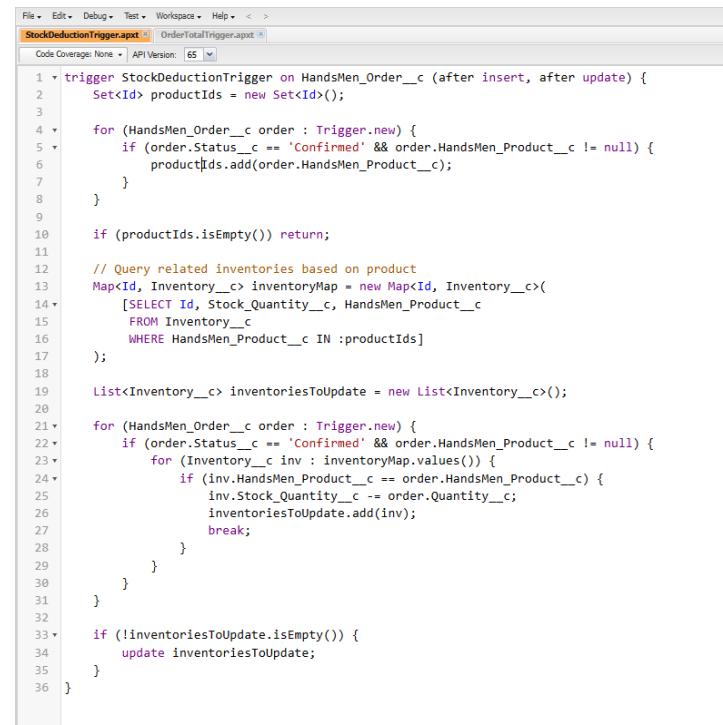


Fig. 9 Order Confirmation Flow

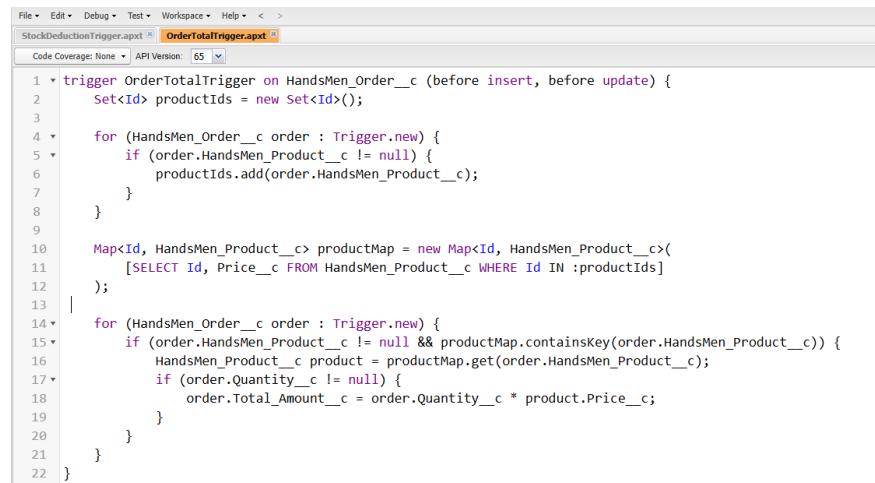


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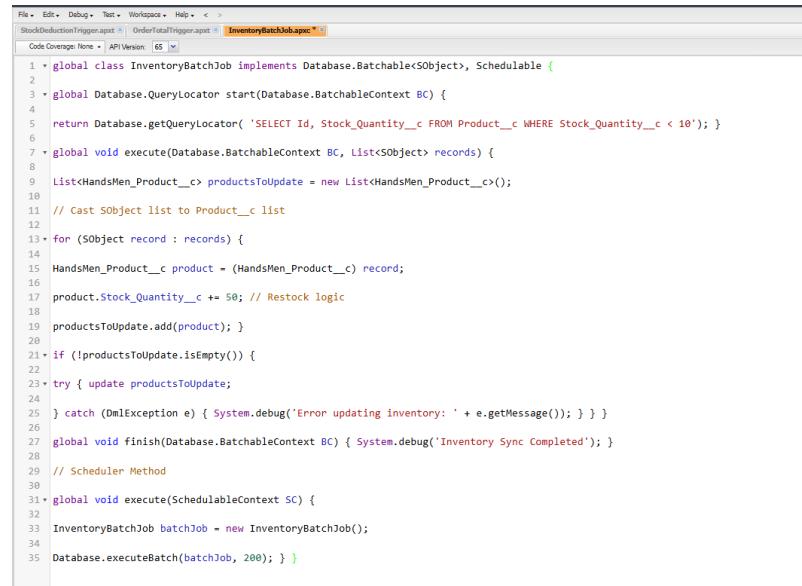
```
File ▸ Edit ▸ Debug ▸ Test ▸ Workspace ▸ Help ▸ < >
StockDeductionTrigger.apxt [ OrderTotalTrigger.apxt ]
Code Coverage: None ▾ API Version: 65 ▾
1 • trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c 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    if (!inventoriesToUpdate.isEmpty()) {
34        update inventoriesToUpdate;
35    }
36 }
```

Fig. 10 Stock Deduction Trigger



```
File ▸ Edit ▸ Debug ▸ Test ▸ Workspace ▸ Help ▸ < >
StockDeductionTrigger.apxt [ OrderTotalTrigger.apxt ]
Code Coverage: None ▾ API Version: 65 ▾
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 }
```

Fig. 11 Order Total Trigger



```
File • Edit • Debug • Test • Workspace • Help • < >
StockReductionTrigger.apc | OrderTotalTrigger.apc | InventoryBatchJob.apc * 1
Code Coverage: None • API Version: 65 [v]
1 * global class InventoryBatchJob implements Database.Batchable<SOObject>, Schedulable {
2
3     * global Database.QueryLocator start(Database.BatchableContext BC) {
4
5         return Database.getQueryLocator('SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10');
6
7     * global void execute(Database.BatchableContext BC, List<SOObject> records) {
8
9         List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
10
11     // Cast SOObject list to Product__c list
12
13     * for (SOObject record : records) {
14
15         HandsMen_Product__c product = (HandsMen_Product__c) record;
16
17         product.Stock_Quantity__c += 50; // Restock logic
18
19         productsToUpdate.add(product);
20
21     if (!productsToUpdate.isEmpty()) {
22
23         try { update productsToUpdate;
24
25     } catch (DmlException e) { System.debug('Error updating inventory: ' + e.getMessage()); }
26
27     global void finish(Database.BatchableContext BC) { System.debug('Inventory Sync Completed'); }
28
29     // Scheduler Method
30
31     * global void execute(SchedulableContext SC) {
32
33         InventoryBatchJob batchJob = new InventoryBatchJob();
34
35         Database.executeBatch(batchJob, 200); }
36
37 }
```

Fig. 12 Inventory Batch Job Class

Phase 3: UI/UX Development & Customization

Lightning App Setup

Created the *HandsMen Threads* Lightning App with all relevant tabs.

Page Layouts & Dynamic Forms

Customized layouts to display customer information, loyalty status, order details, and inventory summaries.

User Management

Created users and assigned appropriate profiles and roles (Sales, Inventory, Marketing).

Reports & Dashboards

Set up initial reports for order tracking and inventory monitoring.

Screenshots:



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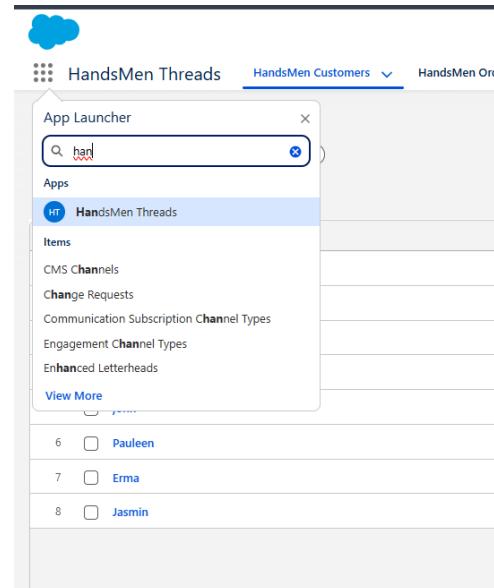


Fig. 13 Lightning App Setup

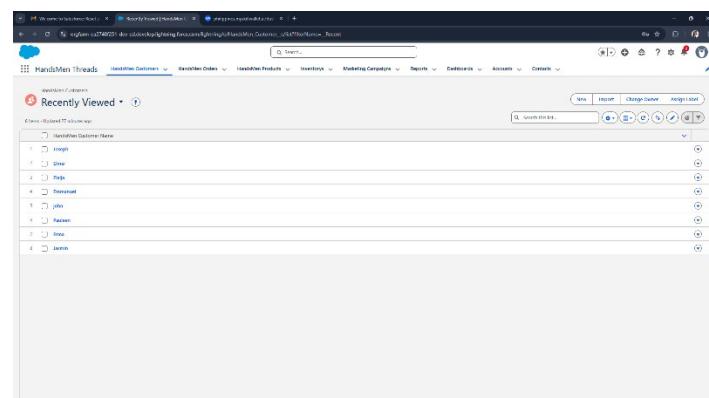


Fig. 14 Page Layout

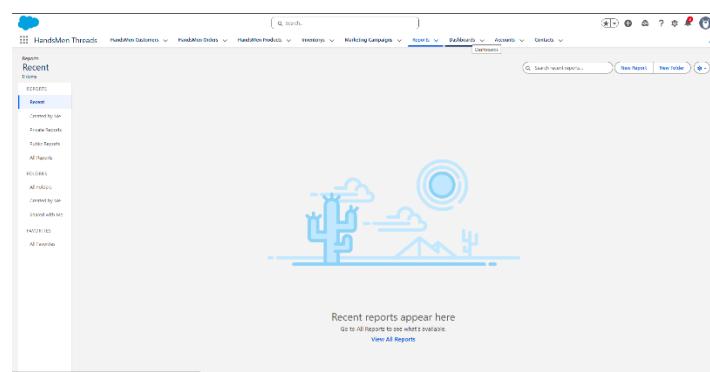


Fig. 15 Reports and Dashboards



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The screenshot shows the 'User Detail' page for 'Niklaus Mikaelson'. The user's name is listed as 'Name: Niklaus Mikaelson'. Under 'User Detail', there are sections for 'Basic Information' (including Name, Alias, Email, Username, Nickname, Title, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver), 'App Registration' (with checkboxes for One-Time Password Authenticator, Salesforce Authenticator, Security Key (2FA or WebAuthn), and Lightning Login), and 'Temporary Verification Code' (Expires in 1 to 24 Hours). On the right side, there are tabs for 'Role', 'Marketing', 'User License', 'Salesforce Profile', and 'Platform'. The 'Role' tab is selected, showing 'Active' checked. Other roles like 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'NDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Lead Lightning Pages While Scrolling', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Make Setup My Default Landing Page', 'Allow Forecasting', 'No MRU Updates', 'Call Center', 'Phone', 'Extension', 'Fax', 'Email Encoding', 'Employee Number', 'Used Data Space', 'Used File Space', and 'Last Login'. Below the tabs, there are sections for 'Last Password Change or Reset' (11/24/2025, 3:48 AM) and 'Created By' (Eduardo Yulo, 11/24/2025, 3:48 AM).

Fig. 16. User Niklaus Mikaelson

The screenshot shows the 'User Detail' page for 'Daniel Mikaelson'. The user's name is listed as 'Name: Daniel Mikaelson'. Under 'User Detail', there are sections for 'Basic Information' (including Name, Alias, Email, Username, Nickname, Title, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver), 'App Registration' (with checkboxes for One-Time Password Authenticator, Salesforce Authenticator, Security Key (2FA or WebAuthn), and Lightning Login), and 'Temporary Verification Code' (Expires in 1 to 24 Hours). On the right side, there are tabs for 'Role', 'Marketing', 'User License', 'Salesforce Profile', and 'Platform'. The 'Role' tab is selected, showing 'Active' checked. Other roles like 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'NDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Lead Lightning Pages While Scrolling', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Make Setup My Default Landing Page', 'Allow Forecasting', 'No MRU Updates', 'Call Center', 'Phone', 'Extension', 'Fax', 'Email Encoding', 'Employee Number', 'Used Data Space', 'Used File Space', and 'Last Login'. Below the tabs, there are sections for 'Last Password Change or Reset' (11/24/2025, 3:48 AM) and 'Created By' (Eduardo Yulo, 11/24/2025, 3:48 AM).

Fig. 17 User Daniel Mikaelson



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Fig. 18 Kol Mikaelson

Fig. 19 Classic Email Template

Phase 4: Data Migration, Testing & Security

Data Migration Tools

Utilized Data Import Wizard to load customer, product, and inventory data.

Security Configurations

Implemented:

- Profiles & Permission Sets
- Roles & Role Hierarchy
- Sharing Rules



- Field History Tracking
- Duplicate & Matching Rules

Test Classes

Created Apex Test Classes to ensure reliability of triggers and logic.

Testing Approach

Prepared and executed test cases for:

- Booking/order creation
- Approval processes
- Flow executions
- Triggered automation
- Inventory deductions
- Loyalty updates

Screenshots:

The screenshot shows the Salesforce 'Profiles' page. At the top, there's a navigation bar with 'Profiles' and links for 'Edit | Delete | Create New View'. Below the navigation is a search bar with placeholder text 'Search Profile Name...'. A sidebar on the left lists various profile types with checkboxes: Action, Admin, Analytics Cloud Integration User, Analytics Cloud Refresh User, Appointee, Appointee, Authorized Website, Authorized Website, External Access Login, External Identity, Guest, Guest, Charter Free, Salesforce, XOrg Proxy User, Salesforce, External Identity, Salesforce, Customer Community Login, Customer Community Plus Login, Customer Community Plus, Customer Identity, Customer Portal Manager Custom, Customer Portal Manager Standard, Einstein Agent, External Apps Login, External Identity, Force.com - App Subsription, and Force.com - Free. On the right, there are tabs for 'User License', 'Identity', 'Authentified Website', 'External Access Login', 'External Identity', 'Guest', 'Charter Free', 'Salesforce', 'XOrg Proxy User', 'Salesforce', 'External Identity', 'Salesforce', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus', 'Customer Identity', 'Customer Portal Manager Custom', 'Customer Portal Manager Standard', 'Einstein Agent', 'External Apps Login', 'External Identity', and 'Force.com - App Subsription'. At the bottom, there are buttons for '129 of 42' and '1 Selected', a URL 'https://my.salesforce.com/lightning/setup/tautoeditProfile.htm', and a page footer with 'Page 1 of 2'.

Fig. 20 Profiles



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 [SETUP](#)

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- ↳ Polytechnic University of the Philippines
 - [Add Role](#)
 - ↳ CEO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ CFO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ COO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ Inventory [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ Marketing [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ Sales [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ SVP-Human Resources [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - ↳ SVP-Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

Fig. 21 Roles

Permission Sets		Help for this page 																																																							
Permission Sets		On this page you can create, view, and manage permission sets.																																																							
All Permission Sets   Create 																																																									
Label	Type	Actions	Description	Permissions	Labels	Actions	Description	Permissions	Labels	Actions	Description	Permissions	Labels																																												
             	Actions	Permissions for Service 	The Data Cloud permission set will be deprecated in Spring '24. Learn more at this link .	            	             	Update Data Cloud Data Access Specialist 	Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects.	          																																																	

  |               | Update Data Cloud Data Access Admin  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Manager  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |          

   |               | Update Data Cloud Data Access Specialist  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Admin  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |         

    |               | Update Data Cloud Data Access Manager  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Specialist  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |        

     |               | Update Data Cloud Data Access Admin  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Manager  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |       

      |               | Update Data Cloud Data Access Specialist  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Admin  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |      

       |               | Update Data Cloud Data Access Manager  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |              |               | Update Data Cloud Data Access Specialist  | Allows access to Data Cloud Setup if the user is also a Data Cloud admin, management of all standard Data Objects. |     

        |   |

Fig. 22 Permission Sets

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name	Owner
<input type="text" value="Joshua"/>	Elaja Jasmin Yap
Email	
<input type="text" value="joshua@234.com"/>	
Phone	<input type="text"/>
Loyalty Status	
<input type="text" value="--None--"/>	
FirstName	<input type="text" value="Joshua"/>
LastName	
<input type="text" value="Lim"/>	
Total Purchases	

∅ We hit a snag.

Review the errors on this page.

- Please fill Correct Gmail

Fig. 23 Customer Validation Rule



Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy

Used Change Sets to move components from development to production.

Maintenance Plan

Outlined procedures for monitoring automation, reviewing error logs, updating security roles, and performing regular data checks.

Troubleshooting Approach

Documented steps to diagnose issues involving flows, triggers, validation rules, and user permissions.

PROJECT EXPLANATION (REAL-WORLD USE CASE)

1. Customer Registration

Store staff enters customer information. Validation rules ensure correct email format. Loyalty status initializes as Bronze.

2. Product & Inventory Management

Admin adds new products. Inventory tracks available stock.

3. Order Processing

Customer places an order. System calculates total automatically through Apex.

4. Inventory Adjustment

Stock is updated immediately when orders are confirmed.

5. Loyalty Program Automation

System updates customer loyalty levels (Bronze → Silver → Gold) based on accumulated purchases.

6. Email Notifications

Customers receive automated emails for order confirmations and loyalty changes.

7. User Roles in the System



Sales users handle customer and order data; inventory managers track stock; marketing users manage campaigns.

CONCLUSION

HandsMen Threads CRM is an appropriate Salesforce-based tool used to enhance the management of customers, process sales, and monitor inventory as well as carry out a loyalty program. With the collection of declarative tools and Apex automation, the system provides operations faster, proper data processing, and improved communication with clients. It is also scalable due to its modular design.

Future Enhancements:

Order tracking and Loyalty portal Customer Community Portal.

Mobile App Salesforce Mobile SDK.

Complex analytics dashboards.

Product recommendations based on Salesforce Einstein, with AI.

WhatsApp/SMS features of automated, customer notifications.