

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

ABSTRACT

This project showcases the development of a custom Salesforce CRM system for HandsMen Threads, a modern brand specializing in men's fashion and bespoke tailoring. The aim of the project was to improve how the company manages its data, streamline day-to-day operations, and provide a more engaging experience for customers. The solution centers on a well-structured data model composed of five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign.

Key business tasks such as confirming orders, updating customer loyalty levels, and alerting teams about low stock were automated using a combination of Apex triggers, scheduled jobs, and flow automation, allowing the system to operate efficiently without manual intervention. Data reliability and security were prioritized through the use of validation rules and a role-based access system tailored for the Sales, Inventory, and Marketing teams.

The implementation also includes an automated batch process that keeps inventory records up-to-date, preventing stock issues and supporting smooth business operations. By integrating automation, structured data management, and personalized customer communication, this Salesforce solution not only enhances operational efficiency but also lays a strong foundation for future growth and scalability within HandsMen Threads.

OBJECTIVE

The main purpose of this project is to design and implement a customized Salesforce CRM solution for HandsMen Threads, a brand focused on sophisticated men's fashion. The goal is to simplify and organize the company's core business operations, ensure the accuracy and consistency of data across all departments, and ultimately enhance the overall experience for customers.

By creating a centralized system that integrates customers, orders, products, inventory, and marketing campaigns, this project aims to transform how the company manages its operations. Key objectives include:

- Automating critical business processes such as sending order confirmations, updating customer loyalty statuses, and issuing timely stock alerts, so that routine tasks are handled efficiently without manual intervention.
- Maintaining data integrity through validation rules that help prevent errors and ensure that all information entered into the system is accurate and reliable.
- Providing real-time visibility into inventory levels, customer interactions, and sales activities, giving teams actionable insights to make informed decisions quickly.
- Improving internal coordination and workflow by implementing role-based access controls, which ensure that team members have the right level of access to data and tools based on their responsibilities.
- Enhancing customer engagement by enabling personalized communication and loyalty programs, allowing the brand to deliver targeted offers, updates, and rewards that foster stronger relationships with customers.

Overall, this project aims to not only optimize daily operations but also create a scalable, future-ready CRM platform that supports HandsMen Threads in delivering a seamless, professional, and highly personalized experience for every customer.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a cloud-based Customer Relationship Management (CRM) platform designed to help organizations efficiently manage their customer data while streamlining business operations. It allows businesses to automate workflows, improve sales processes, and enhance customer service and marketing activities. Salesforce provides both user-friendly, point-and-click tools as well as programmatic features, such as Apex and Flows, enabling the creation of custom solutions tailored to specific organizational needs.

Custom Objects:

In Salesforce, objects function similarly to database tables, storing information about different aspects of the business. Custom Objects are specifically created to capture unique data that standard objects cannot cover. Examples:

- Customer__c – Stores details about each customer.

- Product__c – Holds information about products, including specifications and pricing.
- Order__c – Tracks customer orders and purchase details.

Tabs:

Tabs provide a way to display object data within the Salesforce interface. They allow users to navigate, view, and manage data efficiently. Example: A Product__c tab lets users quickly access and manage product information.

Custom App:

A Salesforce App is a collection of tabs and tools grouped together to support a specific business process. This helps organize related features in one convenient interface.

Profiles, Roles, and Permission Sets:

Profiles define a user's access levels, determining what users can view, edit, or create. Roles control data visibility within Salesforce's hierarchy and support sharing rules. Permission Sets provide additional access rights without altering existing profiles.

Validation Rules, Email Templates & Alerts, Flows, Apex:

Validation Rules ensure data accuracy. Email Templates and Alerts automate communication. Flows automate complex processes without coding, while Apex allows for custom business logic beyond point-and-click tools.

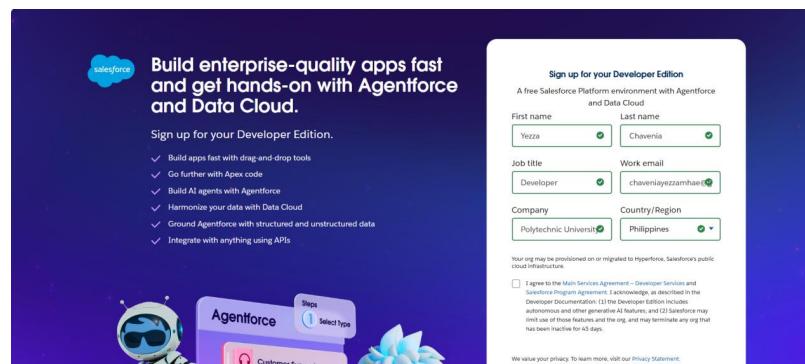
DETAILED EXECUTION OF PROJECT PHASES

1. Salesforce Developer Org Setup

- Created a Salesforce Developer Org via Salesforce Signup.

<https://developer.salesforce.com/signup>

- Verified the account, set password, and accessed the Salesforce Setup page.



2. Custom Object Design

- Created five custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign.
- Defined object labels, API names, and enabled reporting/search features.
- Created dedicated tabs for each object in the Lightning interface.

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Order' custom object. On the left, a sidebar lists various configuration options: 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, and Restriction Rules. The main panel displays the 'Details' tab for the 'HandsMen Order' object. It includes fields for Description, API Name (HandsMen_Order_c), Singular Label (HandsMen Order), and Plural Label (HandsMen Orders). Other settings shown include Enable Reports (unchecked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. At the top right, there are 'Edit' and 'Delete' buttons.

3. Lightning App Creation

- Built a custom Lightning App named HandsMen Threads with tabs: Customer, Product, Order, Inventory, Campaign, Reports.
- Assigned full administrative access to the System Administrator profile.

4. Validation Rules

- Declarative Rules: Prevent saving invalid orders or emails.
- Programmatic (Apex) Rules: Validates order quantities based on status before insert/update using addError().

The screenshot shows the 'New HandsMen Customer' form. At the top, it says 'New HandsMen Customer'. Below that, a note states '* = Required Information'. The form has a 'Information' section with the following fields:

- * HandsMen Customer Name: A text input field containing 'Zyron'.
- Email: A text input field containing 'Zyron.com' with a validation message: 'Enter a valid email address, such as name@email.com.'
- Phone: An empty text input field.
- Loyalty Status: A dropdown menu showing '--None--'.
- FirstName: An empty text input field.
- LastName: An empty text input field.

On the right side of the form, there is an 'Owner' section showing 'Yezza Chavenia' with a user icon. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

HandsMen Order
O-0001

Owner: Yezza Chavenia

HandsMen OrderNumber: O-0001

HandsMen Product: T-shirt Cloth

HandsMen Customer: Search HandsMen Customers...

Status: Confirmed

Quantity: 0

Total Amount: 10

*Customer Email: chaveniayezzamhae@gmail.com

Created By: Yezza Chavenia, 11/7/2025, 10:14 PM

We hit a snag.

Review the following fields

- Quantity

Last Modified By: Yezza Chavenia, 11/7/2025, 10:05 PM

5. User Roles and Profile Configuration

- Cloned the Platform 1 profile for permissions.
- Defined roles: Sales Manager, Inventory Manager, Marketing Team.

6. User Creation

- Assigned users to roles and profiles:
- Niklaus Mikaelson → Sales
- Kol Mikaelson → Inventory
- Zyrion Mikaelson → Marketing

Setup Home Object Manager

User Management Settings

Users

Kol Mikaelson

User Edit

General Information

First Name: Kol
Last Name: Mikaelson
Alias: niklas
Email: chaveniayezzamhae@gmail.com
Username: chaveniayezzamhae05@gr
Nickname: User170258278769129674
Title:
Company:
Department:
Division:

Role: Inventory
User License: Salesforce
Profile: Platform 1
Active:

Messaging User
Office User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: None
Data.com Monthly Add-on Unit: 000
Accessibility Mode (Classic Only):

Niklaus Mikaelson

User Edit

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: niklaus
Email: chaveniayezzamhae@gmail.com
Username: chaveniayezzamhae05@gr
Nickname: User170258278769129674
Title:
Company:
Department:
Division:

Role: Sales
User License: Salesforce
Profile: Platform 1
Active:

Messaging User
Office User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: None
Data.com Monthly Add-on Unit: 000
Accessibility Mode (Classic Only):

7. Email Templates and Alerts

- Created Order Confirmation, Low Stock Alert, Loyalty Program Update templates.
- Integrated with automation flows for reliable messaging.

The screenshot shows the Salesforce Setup interface with the 'Classic Email Templates' page open. The template 'HandsMen Threads' is selected. The details pane shows:

- Classic Letterhead:** HandsMen Threads
- Email Layout:** Free Form Letter
- Encoding:** Unicode (UTF-8)
- Author:** Yezza Chavenna [Change]
- Description:**
- Created By:** Yezza Chavenna, 11/7/2025, 10:45 PM
- Modified By:** Yezza Chavenna, 11/7/2025, 10:45 PM

The 'Email Template' section shows the subject 'Your Order has been Confirmed!' and the HTML preview content:

```


Dear {!HandsMen_Order__c.HandsMen_Customer__c},  

Your order # {!HandsMen_Order__c.Name} has been confirmed!  

Thank you for shopping with us.  

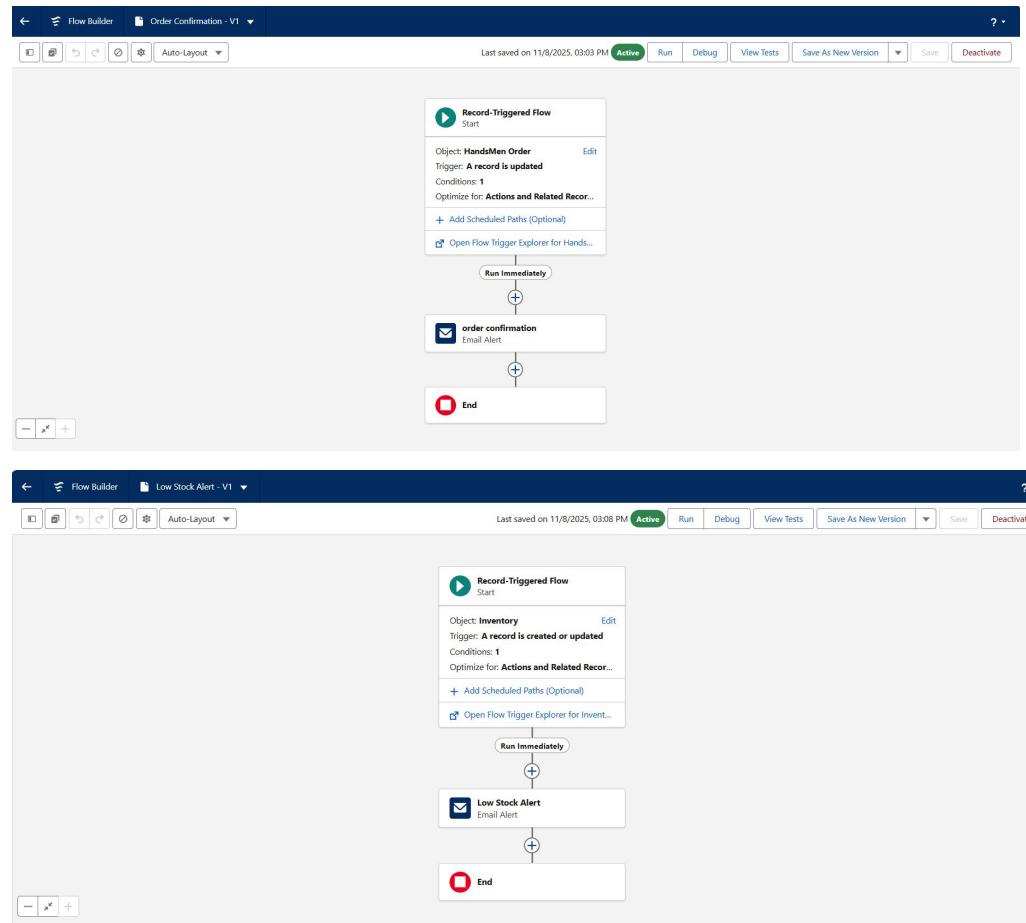
Best Regards,  

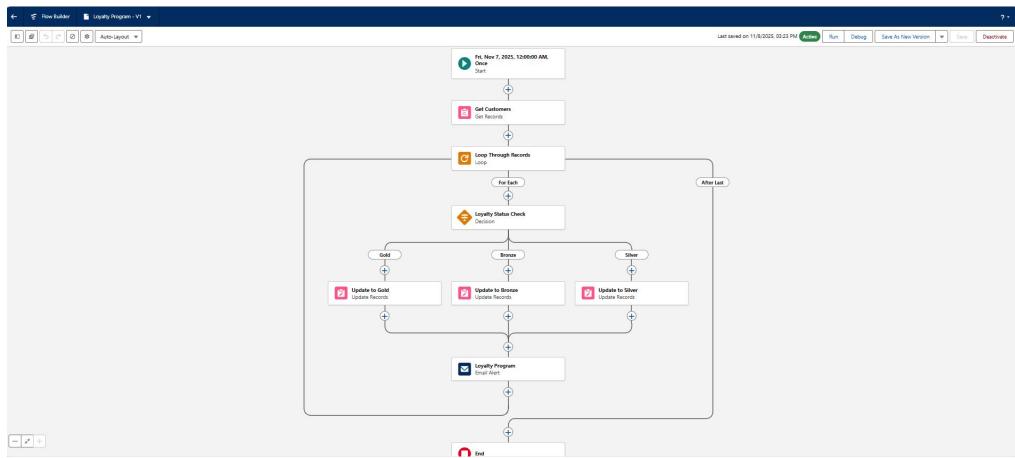
Sales Team


```

8. Flow Implementations

- Order Confirmation Flow, Stock Alert Flow, Scheduled Loyalty Update Flow automated notifications and updates.





9. Apex Triggers & Classes

- Order Total Trigger, Stock Deduction Trigger, Loyalty Status Trigger.
- Apex classes ensure correct order validation and enforce business rules.

PROJECT WALKTHROUGH: REAL-WORLD SCENARIO

1. Customer Registration

- Customer Jennie Kim registers in the store or online portal.
- Salesforce creates a Customer record; validation ensures proper email format.

2. Product Setup

- Admin sets up products with pricing, descriptions, and inventory levels.

3. Placing an Order

- Jennie orders 501 T-shirts at ₩3 each; total calculated automatically.
- Apex triggers ensure quantities meet business rules.

4. Updating Inventory

- Inventory automatically decreases; validation ensures stock never drops below zero.

5. Loyalty Program

- System evaluates total spending to assign Bronze, Silver, or Gold membership.

6. Automated Email Notifications

- Flows send order confirmations and loyalty updates.

7. Users and Roles

- Each Salesforce user has role-specific access to ensure security and efficiency.

SCREENSHOTS

● Custom App for HandsMen Threads

This screenshot shows the 'Recently Viewed' list for 'HandsMen Customers'. The list includes two items: 'Yezza' and 'Jennie'. The interface is a standard CRM-style application with a navigation bar at the top.

● Customer Creation

This screenshot shows the details of a newly created customer record for 'Yezza'. The record includes fields such as Hand's Men Customer Name (Yezza), Email (chaveniayezzamhae@gmail.com), Phone, Loyalty Status, FirstName (Yezza), LastName (Chavera), FullName (Yezza Chavera), Total Purchases (500), and Created By (Yezza Chavera). The record was created on 11/8/2025, 4:37 AM and last modified by Yezza Chavera on 11/8/2025, 4:56 AM. The interface includes tabs for 'Related' and 'Details'.

● Products Management

This screenshot shows the 'Recently Viewed' list for 'HandsMen Products'. The list includes two items: 'Shirt' and 'T-shirt Cloth'. The interface is a standard CRM-style application with a navigation bar at the top.

● Order Confirmation

The screenshot shows the HandsMen Threads CRM application. The top navigation bar includes links for HandsMen Customers, HandsMen Orders (selected), HandsMen Products, Inventories, Marketing Campaigns, Reports, Dashboards, Accounts, Contacts, and a search bar. The main content area displays a HandsMen Order record for O-0005. The 'Details' tab is selected, showing fields such as OrderNumber (O-0005), Owner (Yezza Chavencia), HandsMen Product (Shirt), HandsMen Customer (Yezza), Status (Confirmed), Quantity (550), Total Amount (1,650), Customer Email (chaveniayezzamhae@gmail.com), and Created By (Yezza Chavencia, 11/8/2025, 4:40 AM). The last modified by field also shows Yezza Chavencia.

● Inventory Management

The screenshot shows the HandsMen Threads CRM application. The top navigation bar includes links for HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories (selected), Marketing Campaigns, Reports, Dashboards, Accounts, Contacts, and a search bar. The main content area displays a HandsMen Inventory record for I-0001. The 'Details' tab is selected, showing fields such as Inventory Number (I-0001), HandsMen Product (T-shirt Cloth), Stock Quantity (4), Stock Status (Low Stock), and Warehouse. The last modified by field shows Yezza Chavencia.

● Validation Rules for Rejection, Pending, Confirmed

The screenshot shows the HandsMen Threads CRM application. The main content area displays a HandsMen Order record for O-0001. The 'Details' tab is selected, showing fields such as OrderNumber (O-0001), Owner (Yezza Chavencia), HandsMen Product (T-shirt Cloth), HandsMen Customer (Search HandsMen Customers...), Status (Rejection), and Quantity (0). A validation error message is displayed: "For Status 'Rejection', Quantity must be 0." The Total Amount field contains the value 10. The Customer Email field contains chaveniayezzamhae@gmail.com. A modal window titled "We hit a snag." provides instructions: "Review the following fields" and lists "Quantity". Buttons for "Cancel" and "Save" are at the bottom.

HandsMen Order
O-0001

HandsMen OrderNumber O-0001	Owner Yezza Chavienia
HandsMen Product T-shirt Cloth	
HandsMen Customer Search HandsMen Customers...	
Status Confirmed	
Quantity 0	For Status "Confirmed", Quantity must be more than 500.
Total Amount 10	
*Customer Email chaveniayezzamhae@gmail.com	We hit a snag.
Created By Yezza Chavienia, 11/7/2025, 10:14 PM	Review the following fields • Quantity
	Edited By Yezza Chavienia, 11/7/2025, 11:05 PM
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

HandsMen Order
O-0001

O-0001	Yezza Chavienia
HandsMen Product T-shirt Cloth	
HandsMen Customer Search HandsMen Customers...	
Status Pending	
Quantity 0	For Status "Pending", Quantity must be more than 200.
Total Amount 10	
*Customer Email chaveniayezzamhae@gmail.com	We hit a snag.
Created By Yezza Chavienia, 11/7/2025, 10:14 PM	Review the following fields • Quantity
	Edited By Yezza Chavienia, 11/7/2025, 11:05 PM
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

● Email Notifications: Order Confirmation, Low Stock, Loyalty Program

Your Order has been Confirmed! [Spam](#)

 **Yezza Chavienia** via 6rpsu89zathic3g5-1hyaceaw.ind168.bnc.salesforce.com to me ▾ Sat 8 Nov, 20:44 (3 days ago) [Star](#) [Reply](#) [Forward](#) [More](#)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Dear Yezza,

Your order #O-0005 has been confirmed!

Thank you for shopping with us.

Best Regards,
Sales Team

The image displays two screenshots of Salesforce emails. The top email, titled 'Low Stock Alert Email' (Spam), is from 'Yezza Chavenia' via 'pmkybv3972c3.g5-1hyaoeaw.ind168.bnc.salesforce.com' to the user. It was sent on Saturday, November 8, at 20:53 (3 days ago). The message body states: 'Dear Inventory Manager, This is to inform you that the stock for the following product is running low: Product Name: Shirt Current Stock Quantity: 4 Please take the necessary steps to restock this item immediately. Best Regards, Inventory Monitoring System'. Below the message are standard email interaction buttons: Reply, Forward, and a smiley face icon. The bottom email, titled 'Loyalty Program Email' (Spam), is from 'OrgFarm EPIC <epic.orgfarm@salesforce.com>' to the user. It was sent on Saturday, November 8, at 15:25 (3 days ago). The message body says: 'Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program. Enjoy exclusive discounts, early access to offers, and special member benefits. Thank you for your continued Support.' This email also includes Reply, Forward, and a smiley face icon buttons.

CONCLUSION

The HandsMen Threads CRM simplifies customer management, product catalog maintenance, order handling, inventory monitoring, and loyalty program management. By utilizing Salesforce features like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system delivers:

- Accurate and up-to-date data: Minimizes errors and improves efficiency.
- Better customer experience: Enhances engagement and satisfaction.
- Informed decision-making: Provides actionable insights on sales, inventory, and orders.
- Scalable operations: Supports growth with flexible roles and new products.
- Streamlined workflows: Reduces manual intervention, boosting productivity.

Overall, this CRM demonstrates how Salesforce's declarative and programmatic tools can support operational efficiency and customer satisfaction.

FUTURE SCOPE

1. **Customer Portal Integration** – Self-service portal for order tracking, loyalty points, and inquiries.
2. **Mobile Access via Salesforce Mobile SDK** – Mobile inventory, order management, and push notifications.
3. **Enhanced Reporting and Dashboards** – Interactive dashboards and predictive analytics.
4. **AI-Powered Product Recommendations (Einstein)** – Personalized suggestions to improve engagement.
5. **WhatsApp/SMS Communication Integration** – Timely updates for orders and promotions.
6. **Gamification and Engagement Features** – Loyalty badges and tiered rewards.
7. **E-commerce and Payment Gateway Integration** – Synchronize orders, payments, and inventory.
8. **Advanced Automation and Process Improvements** – Manage bulk orders, returns, and customer segmentation.