

**Salesforce CRM Capstone Project:**  
**HandsMen Threads: Elevating the Art of**  
**Sophistication in Men's Fashion**

**by**

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

#### **ABSTRACT**

This project presents the creation of a customized Salesforce CRM system for **Hands Men Threads**: Elevating the Art of Sophistication in Men's Fashion. The primary goal was to streamline internal processes, enhance customer engagement, and ensure consistent, accurate data across all departments.

A detailed data model was developed, featuring five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Essential business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex, enabling functions such as sending order confirmations, updating customer loyalty tiers, and issuing early notifications for low inventory levels.

To maintain high data quality, the system includes robust validation rules and a role-based security structure specifically designed for the Sales, Inventory, and Marketing teams. An Apex-driven scheduled batch job was also implemented to regularly assess and update items with low stock.

Overall, this CRM solution improves customer satisfaction through tailored communication, increases operational efficiency via automation, and provides a scalable foundation for future growth on the Salesforce platform.

## **OBJECTIVE**

The primary objective of this project is to design and implement a customized Salesforce CRM solution for HandsMen Threads that enhances daily operations, ensures data accuracy, and elevates overall customer satisfaction.

By creating a unified platform to oversee customers, orders, products, inventory, and marketing campaigns, the project seeks to:

- Automate essential workflows including order confirmations, loyalty status updates, and low-stock alert notifications.
- Ensure consistent and dependable data through clearly defined validation rules.
- Provide real-time visibility into inventory levels and customer activities.
- Improve collaboration across departments through role-based access controls.
- Enhance customer engagement with personalized communication and loyalty tier/status programs.

## **TECHNOLOGY DESCRIPTION**

### **Salesforce:**

Salesforce is a cloud-based CRM platform designed to help organizations manage customer information, streamline business processes, and enhance activities related to sales, marketing, and customer service. It provides intuitive point-and-click configuration tools along with programmable features such as Apex and Flows, enabling businesses to build customized solutions that meet their operational requirements.

## **Custom Objects:**

Objects in Salesforce function like tables in a database. Custom Objects are created to store business-specific data.

Examples:

- **Customer\_\_c** – Stores customer information
- **Product\_\_c** – Stores product details
- **Order\_\_c** – Stores order records

## **Tabs:**

Tabs present object data in the Salesforce user interface.

Example:

- A **Product\_\_c** tab allows users to easily view and manage product records.

## **Custom App:**

A Salesforce App is a group of tabs organized together to serve a specific business purpose.

## **Profiles:**

Profiles define what a user can view, edit, and perform within Salesforce. They control object permissions, field access, and other capabilities.

## **Roles:**

Roles determine data visibility within the Salesforce role hierarchy. They influence how records are viewed across the organization but are not used for sharing settings or reporting.

## **Permission Sets:**

Permission Sets provide users with additional access rights without modifying their profile.

**Validation Rules:**

Validation Rules ensure that data entered meets required business criteria.

Examples:

- Email must contain **@gmail.com** (other domains such as @xyz or @abc are not allowed)
- Stock value cannot be negative

**Email Templates:**

Email Templates are predefined formats used to send consistent and professional messages to customers or internal users.

Example:

- An “Order Confirmation” template sent via Gmail

**Email Alerts:**

Email Alerts are automated actions in Flows or Workflow Rules that send emails using predefined templates.

Example:

- When a customer’s loyalty level changes, an email notification is automatically sent

**Flows:**

Flows automate business processes without needing code. They can create records, update data, or send notifications.

Example:

- A Flow that triggers an email alert whenever a new order is created

**Apex:**

Apex is Salesforce’s object-oriented programming language used to write custom logic and advanced automation.

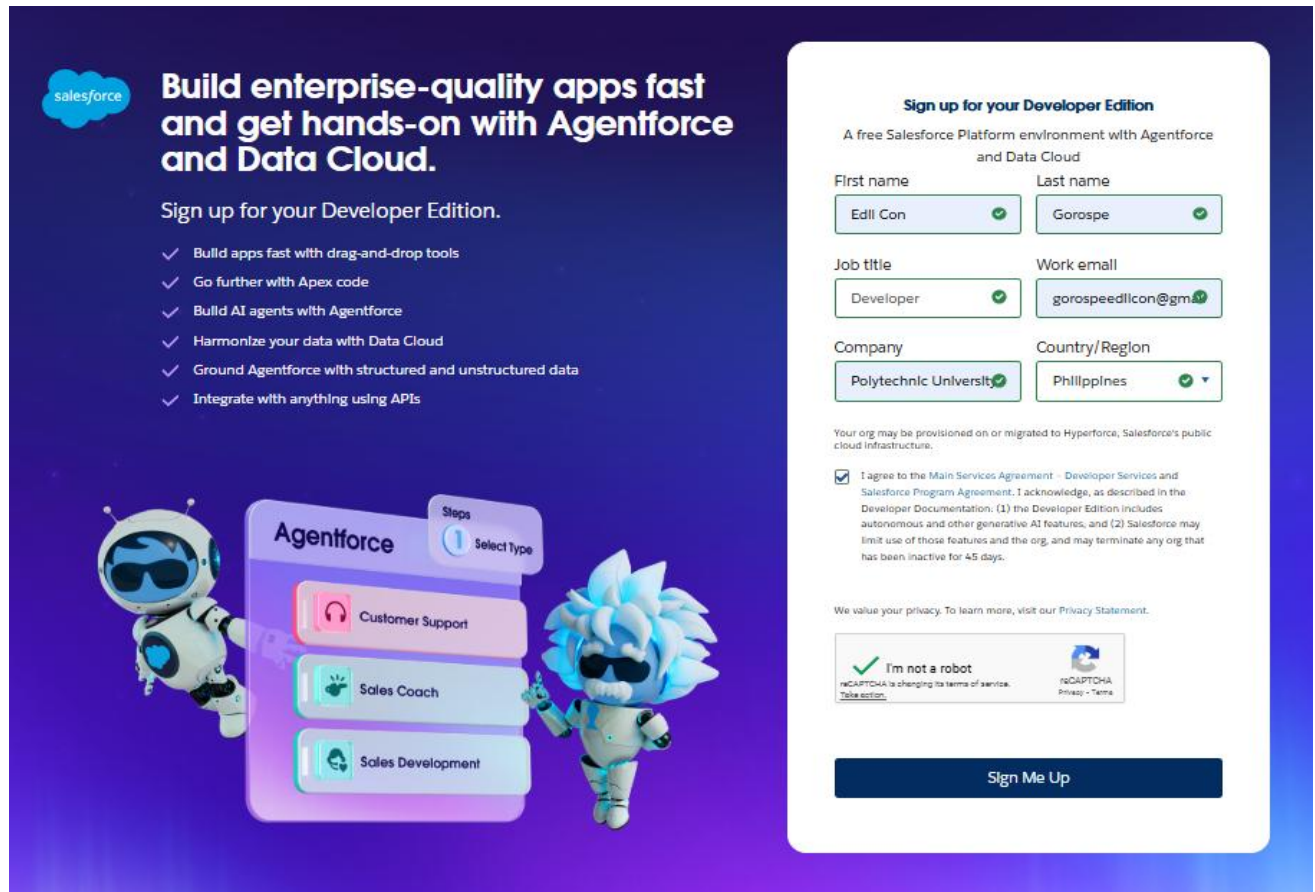
Example Triggers:

- Automatically update **Total\_Amount\_\_c** on an Order record
- Automatically deduct stock from Inventory when an order is placed

**DETAILED EXECUTION OF PROJECT PHASES**

## 1. Developer Org Setup

- A Salesforce Developer Org was created using this hypertext link:  
<https://developer.salesforce.com/signup>.
- Account is then verified through gmail sent link, password set and is then granted access to the Salesforce Setup page.



The image shows the Salesforce Developer Edition signup page. On the left, there's a promotional banner with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Ground Agentforce with structured and unstructured data". At the bottom of the banner, there's a graphic of two robot characters, one white and one blue, standing next to a screen displaying "Agentforce" and three options: "Customer Support", "Sales Coach", and "Sales Development".

On the right, the "Sign up for your Developer Edition" form is displayed. It includes fields for "First name" (Edill Con), "Last name" (Gorospa), "Job title" (Developer), "Work email" (gorospeedilcon@gmail.com), "Company" (Polytechnic University), and "Country/Region" (Philippines). Below these fields, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement." and a "Sign Me Up" button. At the bottom, there's a reCAPTCHA "I'm not a robot" checkbox and a link to the "Privacy Statement".

## 2. Custom Object Creation

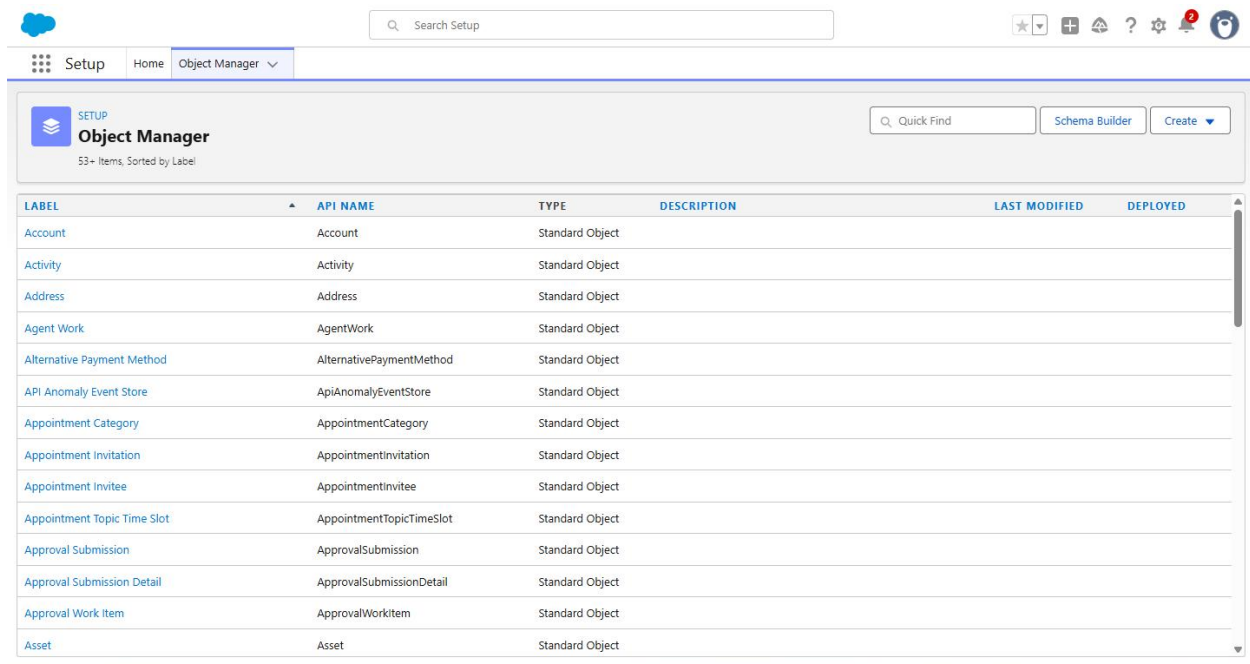
In the Custom Object Creation, there are Five (5) custom objects that were created to store the necessary business-critical data:

- **HandsMen Customer** – Stores the customer information (email, phone number, loyalty status) for the Creation of the Custom Objects.

- **HandsMen Product** – Stores the product catalog details. SKU (Unique Product Number), price, and stock for the Creation of the Custom Objects.
- **HandsMen Order** – Stores the orders placed by the customers, including product quantity, and status for the Creation of the Custom Objects.
- **Inventory** – The Inventory tracks the stock quantity and its warehouse location, necessary for the Creation of the Custom Objects.
- **Marketing Campaign** – The Marketing Campaign stores the promotional campaigns and scheduling for the Custom Objects.

### Steps as followed:

- Go to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Object Manager' section is active, showing '53+ Items, Sorted by Label'. A table lists various standard objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, and Asset.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkitem	Standard Object			
Asset	Asset	Standard Object			

### 3. Creating the Lightning App

- A custom Lightning App named “**HandsMen Threads**” was created
- The tabs included are: **HandsMen Customer, Order, Product, Inventory, Campaign, Reports etc.**
- Assigned to the System Administrator profile

#### 4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object:** it Prevents saving if Total\_Amount\_\_c <=0.  
Error: *"Please enter correct amount"*
- **Customer Object:** it validates if email contains **"@gmail.com"**.  
Error: *"Please fill correct Gmail"*

The screenshot shows a 'New HandsMen Customer' form. The form is titled 'New HandsMen Customer' and includes a search bar at the top. It contains several input fields for customer information, a dropdown for Loyalty Status, and a section for Owner information. The form is set against a background of a CRM interface with various buttons and a sidebar.

Information

\* HandsMen Customer Name (Required Information)

Email

Phone

Loyalty Status

FirstName

LastName

Total Purchases

Owner

Buttons: Cancel, Save & New, Save

#### 5. User Role & Profile Setup

- Cloned the Standard User Profile to a new profile named Platform 1, and added access to necessary custom objects.
- Created roles for different departments:



## -Sales Manager, Inventory Manager, Marketing Team

### 6. Users Creation

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their own responsibilities:

- **Niklaus Mikaelson** – Assigned for the Sales Role
- **Kol Mikaelson** – Assigned for the Inventory Role

The screenshot shows the Salesforce Setup interface for a user named Niklaus Mikaelson. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area displays the user's details and settings. The user's name is Niklaus Mikaelson, and their email is goroospeedlion2125@agentforce.com. The user is assigned the Sales role and the Salesforce profile. The user is active and has a marketing user checkbox checked. The user's address is St. Bernadette phase 1, 1005, Pinamagayen, 5008, Philippines. The user's time zone is (GMT-08:00) Pacific Standard Time (America/Los\_Angeles). The user's locale is English (United States) and their language is English. The user's delegated approver is Manager. The user's federation ID is Only if I am an approver. The user's app registration is One-Time Password Authenticator. The user's app registration is Salesforce Authenticator. The user's security key is (SUF or WebAuthn). The user's lightning login is (Generate). The user's temporary verification code expires in 1 to 24 hours. The user's role is Sales, user license is Salesforce, and profile is Platform 1. The user has checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forecasting, and No MRU Updates.

### 7. Email Template & Alerts

Created three email templates:

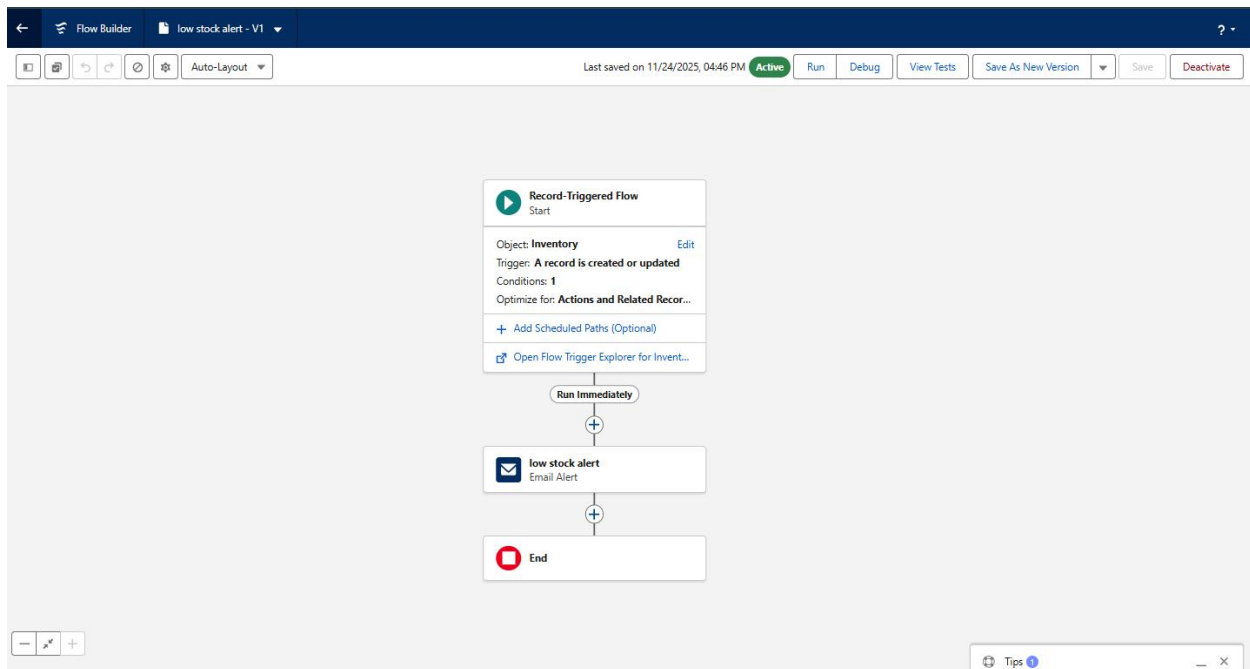
- **Order Confirmation** – Sent on order status = “Confirmed”
- **Low Stock Alert** – Sent when Inventory of a product < 5 units
- **Loyalty Program Email** – Sent when loyalty status changes

Corresponding email alerts were created using three templates and linked to automation flows.



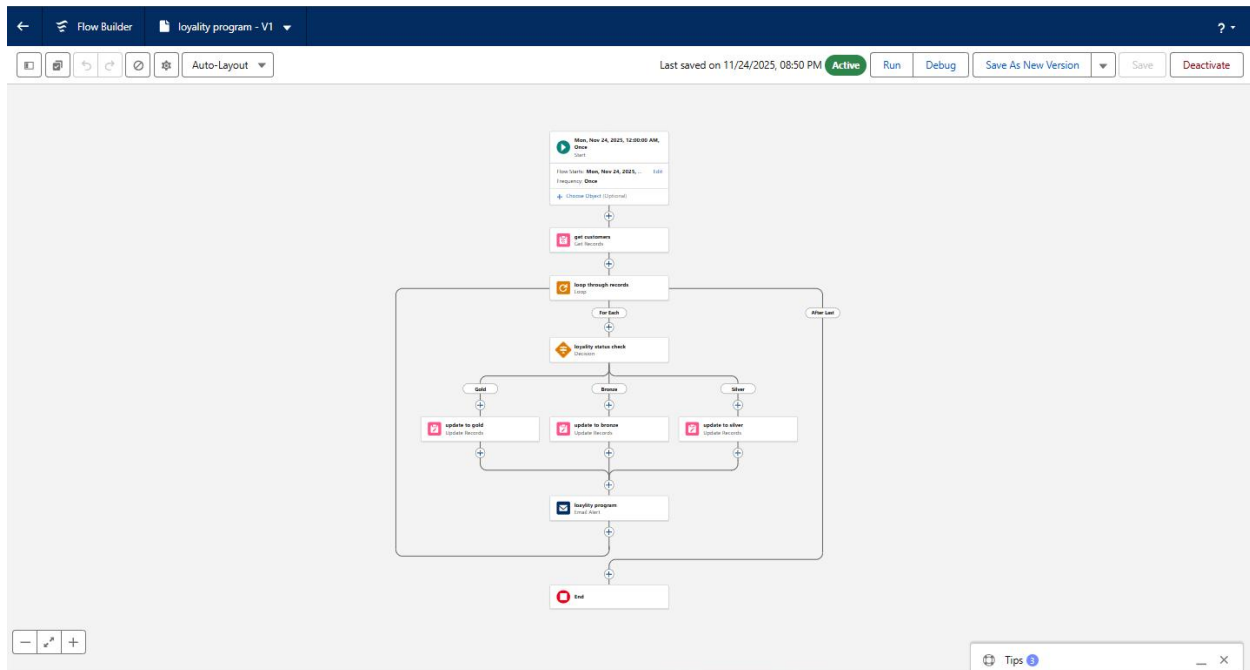
## b. Stock Alert Flow

- Triggered when inventory stock drops below 5.
- Sends Low Stock Email to inventory manager.



## c. Scheduled Flow: Loyalty Update Alert

- Runs daily at Monday, Nov 12:00AM
- Loops through customers and updates their loyalty status based from the customer's total purchase.



## 9. Apex Triggers

- **Order Total Triggers:** Auto-calculates Total Amounts based on the quantity and the product price.
- **Stock Deduction Triggers:** Reduces stock when an order is placed.
- **Loyalty Status Triggers:** Updates loyalty status based on the total purchases.

## PROJECT EXPLANATION WITH REAL WORLD SCENARIO

Project Explanation.

### 1. Customer Registration

- A customer, Albert And Einstein, visits a store or a web-based store (ex. Lazada)
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- **Validation Rule:** Ensures the email is valid (e.g., must contain @gmail.com).

## 2. Product Setup

- Then admin adds products like Sleeveless Shirt, into the Product\_\_c object.
- Each product has a price and other details.
- Inventory is also created to **manage stock** for these products.

## 3. Order Placement

- Albert decides to buy 400 shirts (each \$15). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: **Automatically calculates Total\_Amount\_\_c** =  $15 \times 400 = \$6000$ .

## 4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces sleeveless shirt stock by 5.
- Validation Rule: Ensures stock never goes below 0.

## 5. Loyalty Program

- Albert now has a total purchase of \$6000
- A trigger on Customer checks for his total purchases.

Based on the Value:

**< \$500 → Bronze**

**\$500 - \$1000 → Silver**

**\$1000 → Gold**

- So, Albert becomes a **Silver Loyalty Member**

## 6. Email Notification


- When a new order is placed or loyalty status is updated:
- Flow + Email alert is triggered.
- Mark gets an email notification:  
***“Thanks for your purchase! Your loyalty status is now Silver.”***

## 7. Users and Roles

Salesforce users like store staff are created:

- **Niklaus Mikaelson** – Sales Role (Platform 1 Profile)
- **Kol Mikaelson** – Inventory Role (Platform 1 Profile)

# SCREENSHOTS



HandsMen Threads

HandsMen Customers

Recently Viewed

New

Import

Change Owner

Assign Label

2 items • Updated a few seconds ago

	<div><input type="checkbox"/> HandsMen Customer Name</div>	
1	<div><input type="checkbox"/> jhon</div>	<div></div>
2	<div><input type="checkbox"/> Albert And Einstein</div>	<div></div>

Fig: Custom App for HandsMen

Threads\

New HandsMen Customer

\* = Required Information

Information

\* HandsMen Customer Name

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Owner

Edil Con Gorospe

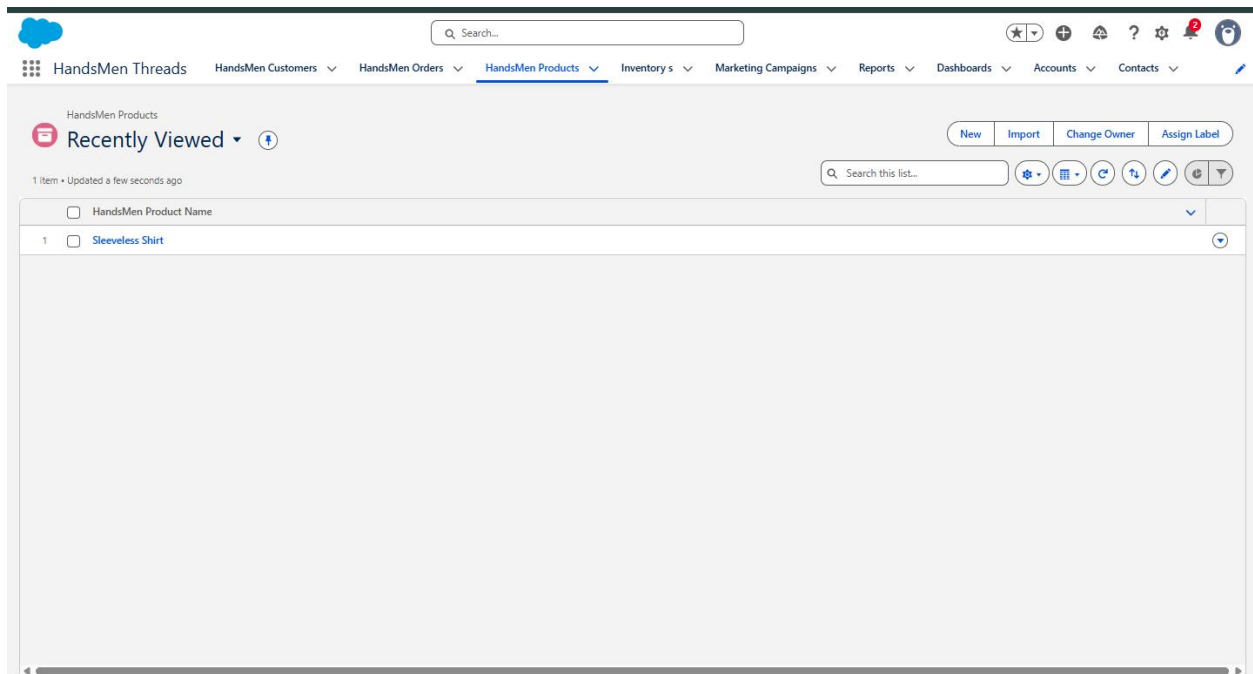
Cancel

Save & New

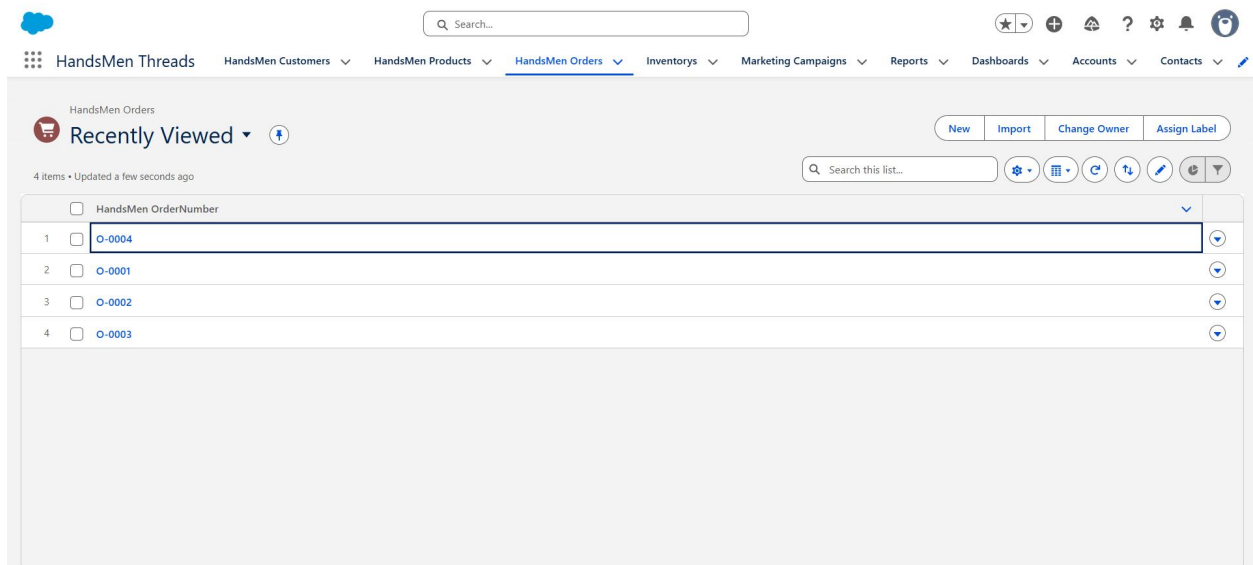
Save

Fig: Creation of a New HandsMen Customer

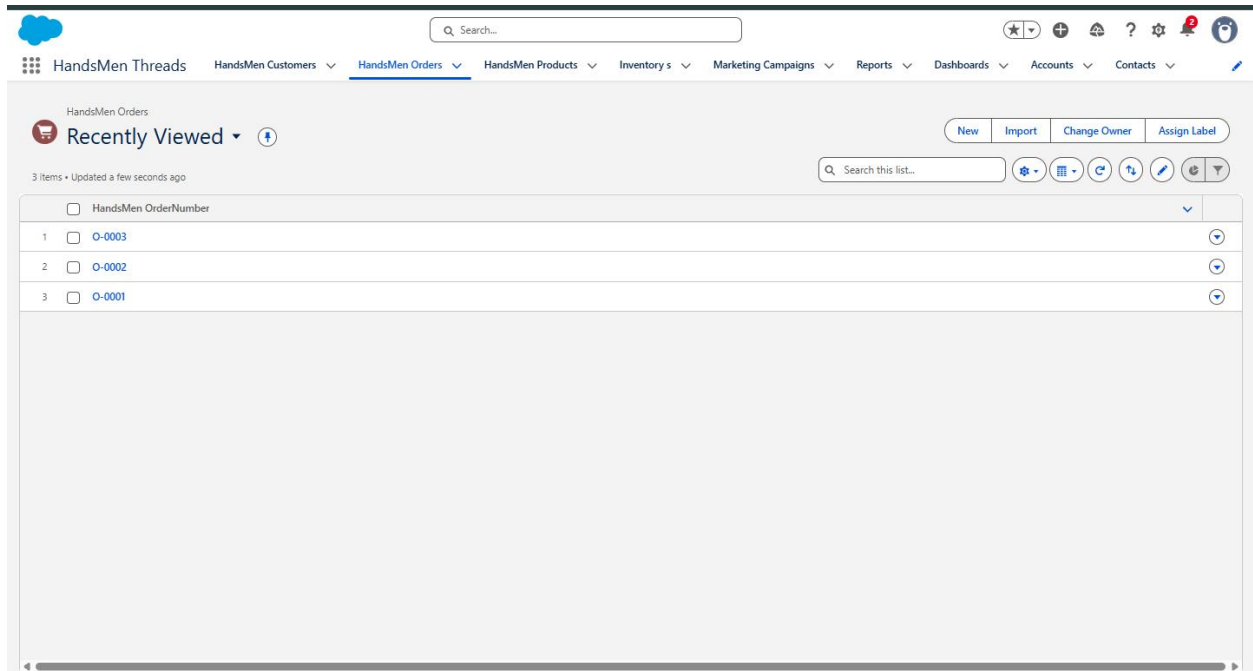




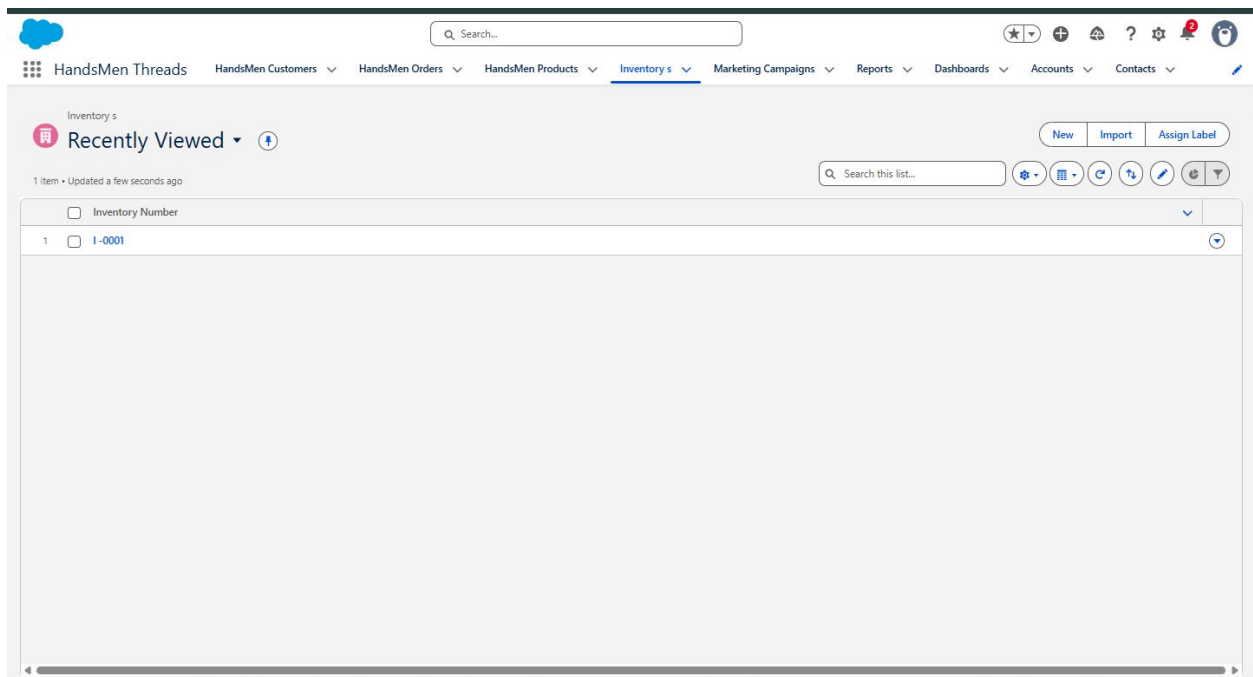
**Fig: HandsMen Products Page**



**Fig: HandsMen Orders Page**



**Fig: Order Details in HandsMen Orders Page**



**Fig: Inventories Page in HandsMen Threads**

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventory s

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

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+

🏠

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⚙️

🔔

👤

Inventory

I-0001

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I-0001

HandsMen Product

[Sleeveless Shirt](#)

Stock Quantity

600

Stock Status

Available

Warehouse

Created By

Edil Con Gorospe, 11/23/2025, 9:39 PM

Last Modified By

Edil Con Gorospe, 11/24/2025, 5:44 AM

**Fig: Inventory Details of a Specific Product**

## **CONCLUSION**

The Salesforce-based CRM system developed for Hands Men Threads effectively streamlines major business operations, including customer management, product cataloging, order handling, inventory monitoring, and loyalty program automation. By utilizing Salesforce features such as Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data input, real-time updates, and an improved overall customer experience. With automated processes and well-defined user roles, the platform reduces manual errors, accelerates workflows, and provides valuable insights into sales performance and stock levels.

### **Future Scope:**

- **Customer Portal Integration**
  - Develop a Customer Community Portal that allows customers to log in, view their orders, and monitor their loyalty status.
- **Mobile Application via Salesforce Mobile SDK**
  - Enable store personnel to manage inventory and process orders through a mobile-friendly interface.
- **Advanced Reports & Dashboards**
  - Build comprehensive sales and inventory dashboards to help management track performance and spot trends in real time.
- **AI-Powered Recommendations (Einstein)**
  - Integrate Salesforce Einstein to deliver personalized product recommendations based on purchase history.
- **WhatsApp/SMS Integration**
  - Implement messaging integrations to send order confirmations and loyalty updates through WhatsApp or SMS.

## **REFERENCE**

**Documentation reference:**

<https://www.youtube.com/watch?v=ny7Ltxs61bc&t=863s>