

Salesforce CRM Capstone Project:

HandsMen Threads: Elevating the Art of

Sophistication in Men's Fashion

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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.

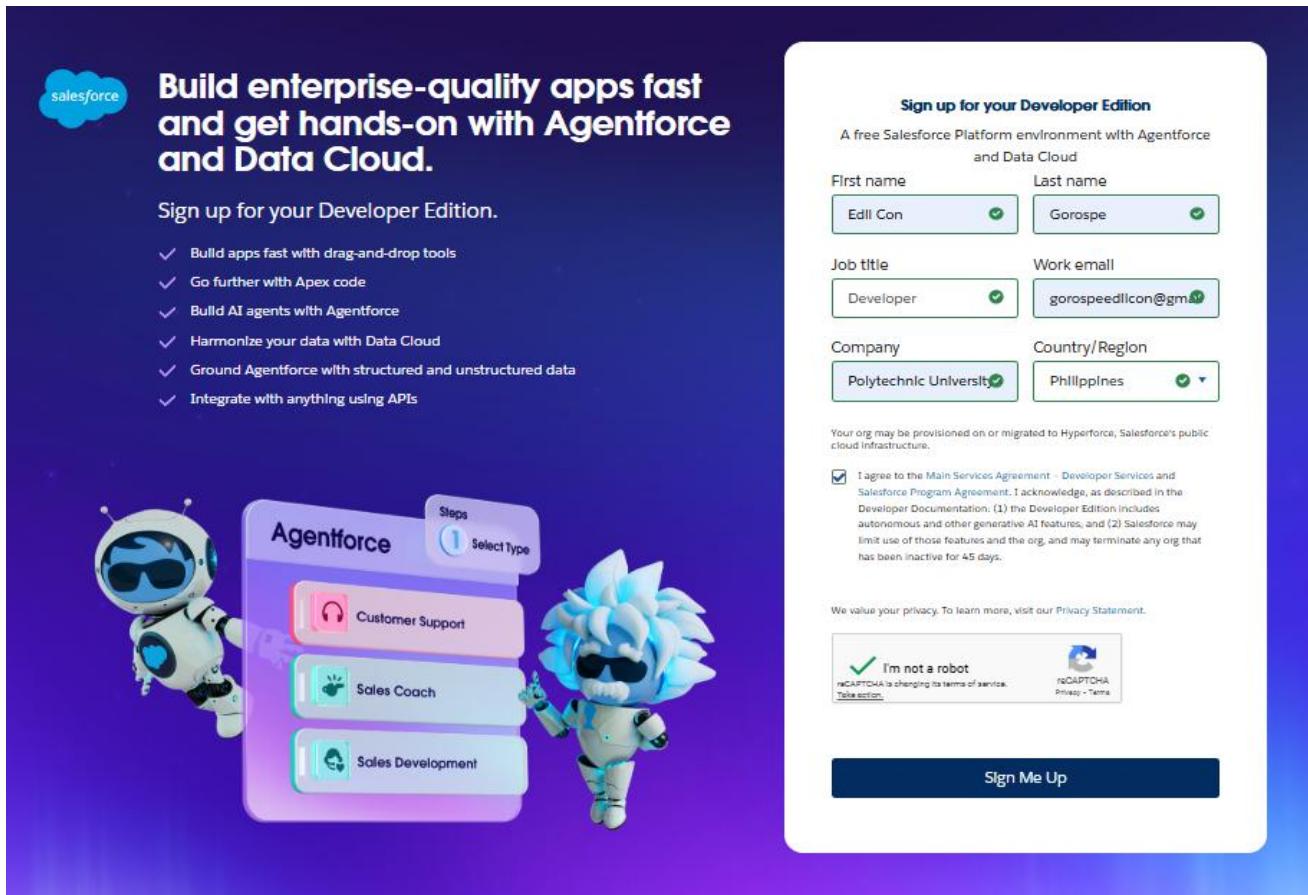
Example Triggers:

- 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.



2. Custom Object Creation

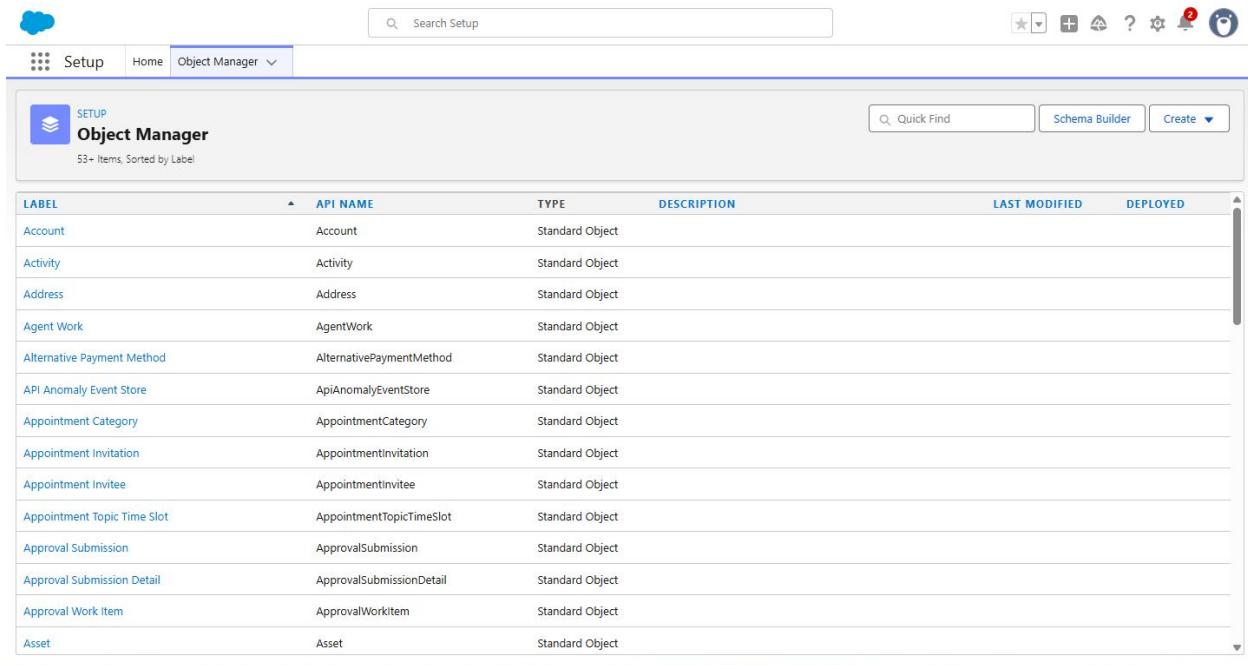
In the Custom Object Creation, there are Five (5) custom objects that were created to store the necessary business-critical data:

- **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 page. At the top, there are navigation tabs: Setup, Home, and Object Manager (which is selected). A search bar labeled "Search Setup" is located at the top right. Below the header, there's a toolbar with various icons. The main area is titled "Object Manager" and displays a list of objects. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists 53 items, sorted by Label. Some examples of 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 Salesforce 'New HandsMen Customer' form. The 'Information' section contains several fields: 'HandsMen Customer Name' (Albert And Einstein), 'Email' (e_mcsquare@gmail.com), 'Phone' (09457232131), 'Loyalty Status' (None), 'FirstName' (Albert), 'LastName' (Einstein), and 'Total Purchases' (empty). The 'Email' field is highlighted with a yellow background, indicating it has been validated according to the rules defined in section 4. The 'Owner' field shows Edil Con Gorospe. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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 under the 'Users' tab. On the left, there's a sidebar with navigation links like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' link is highlighted. The main area displays the 'User Detail' for 'Niklaus Mikaelson'. The user's name is listed as 'Niklaus Mikaelson' with an alias 'nmika'. The email is 'gorospeedicon381@agentforce.com' with a verification status. The username is 'gorospeedicon2129@agentforce.com'. The nickname is 'User17839632197738120232'. The role is 'Sales' and the profile is 'Platform_1'. Other roles listed include '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'. Buttons for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary' are at the top of the detail section.

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.

Search Setup

classic e

SETUP Classic Email Templates

HTML Email Template Order_Confirmation_Email

Preview your email template below.

Email Template Detail

Email Templates from Interphase	Unlisted Public Classic Email Templates
Email Template Name	Order_Confirmation_Email
Template Unique Name	Order_Confirmation_Email
Content Language	English (US)
Email Layout	Free Form Letter
Encoding	Unicode (UTF-8)
Author	Edi Con George [Changed]
Description	Created By Edi Con George, 11/23/2005, 11:14 PM

Available For Use Last Used Date Times Used

Modified By Edi Con George, 11/23/2005, 11:14 PM

Email Template

Subject: Your Order has been Confirmed!

HTML Preview

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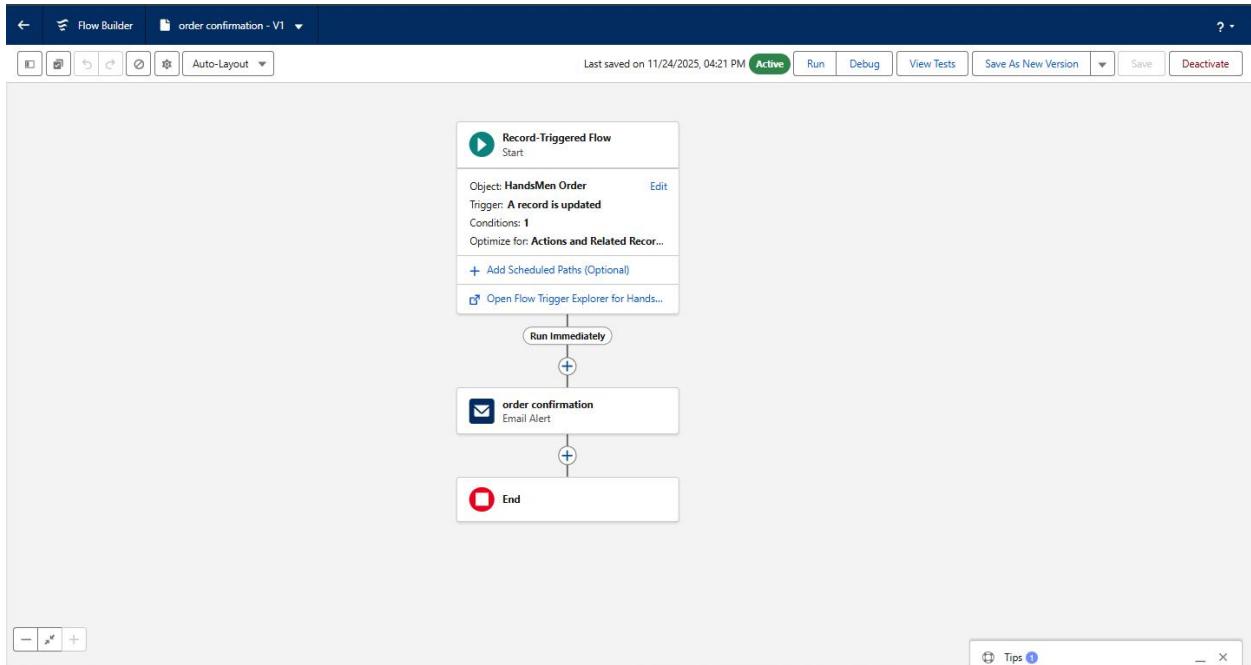
Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order # {!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team
Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order # {!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

```

8. Flow Implementations

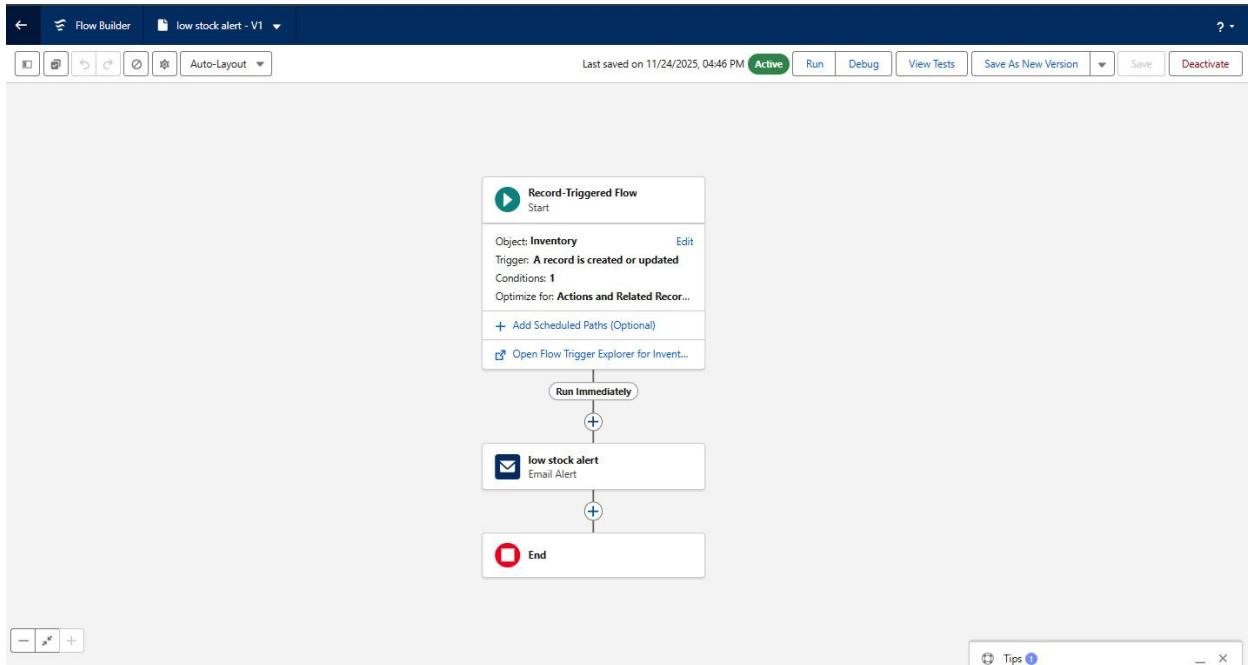
a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



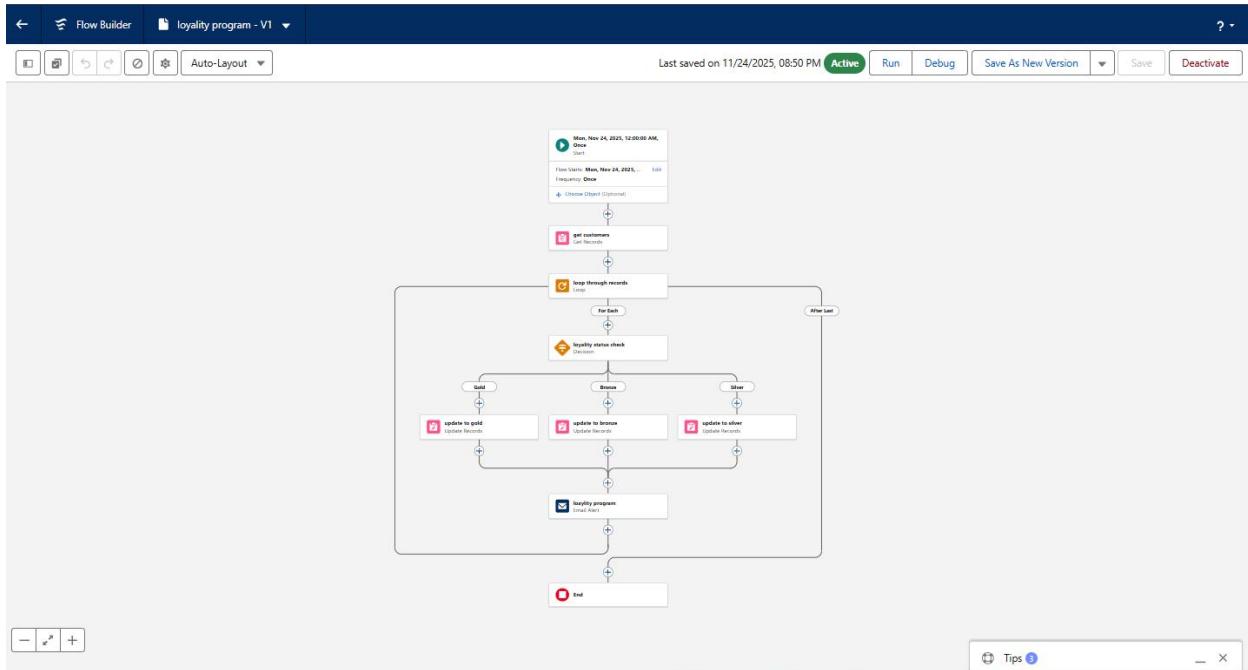
b. Stock Alert Flow

- 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 x 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

The screenshot shows a CRM application interface with a navigation bar at the top. The navigation bar includes links for HandsMen Threads, HandsMen Customers (which is the active tab), HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. There is also a search bar and a toolbar with various icons.

The main content area displays a list titled "Recently Viewed" under the "HandsMen Customers" section. It shows two items: "jhon" and "Albert And Einstein". Each item has a checkbox next to it. The list includes a header row with a checkbox and the column title "HandsMen Customer Name". Below the list are standard CRM actions: New, Import, Change Owner, and Assign Label. A search bar and filter icons are also present.

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

Fig: Custom App for HandsMen

The screenshot shows a custom application window titled "New HandsMen Customer". At the top right, there is a note: "* = Required Information". The main section is labeled "Information". It contains several input fields: "HandsMen Customer Name" (marked with an asterisk), "Email", "Phone", "Loyalty Status" (a dropdown menu showing "--None--"), "FirstName", "LastName", and "Total Purchases". To the right of the "HandsMen Customer Name" field, there is an "Owner" section showing a profile picture of a person named Edil Con Gorospe. At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save". On the far left edge of the window, the word "Threads\" is partially visible.

**Fig: Creation of a New HandsMen
Customer**

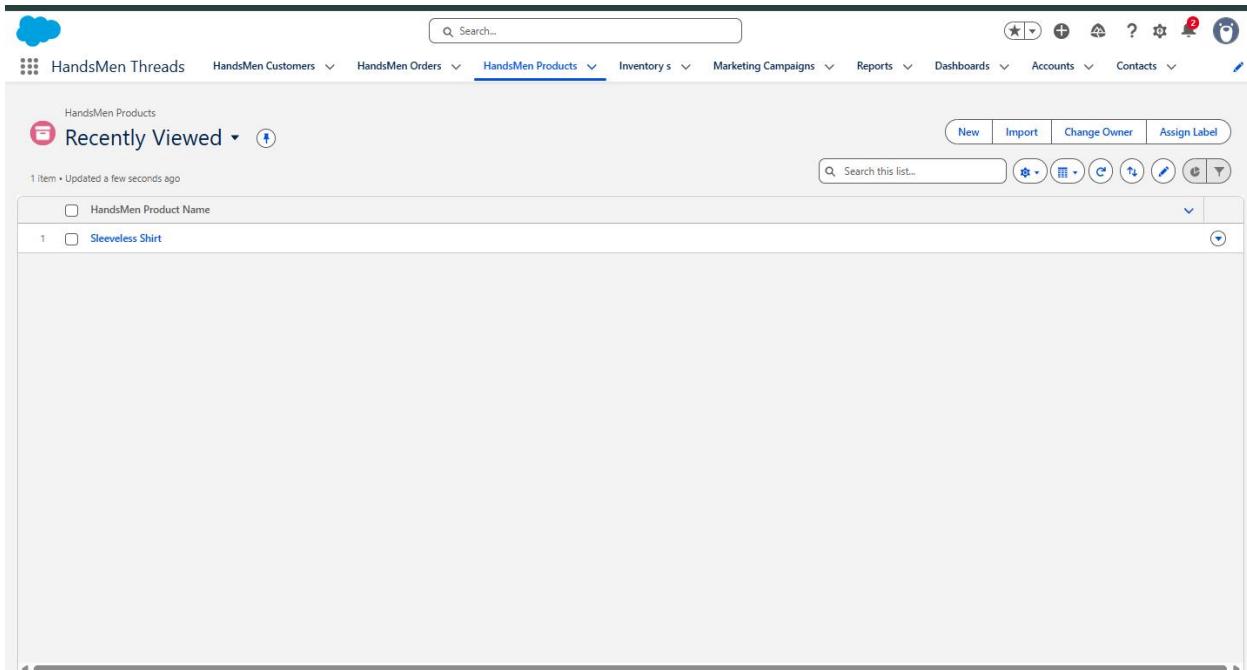


Fig: HandsMen Products Page

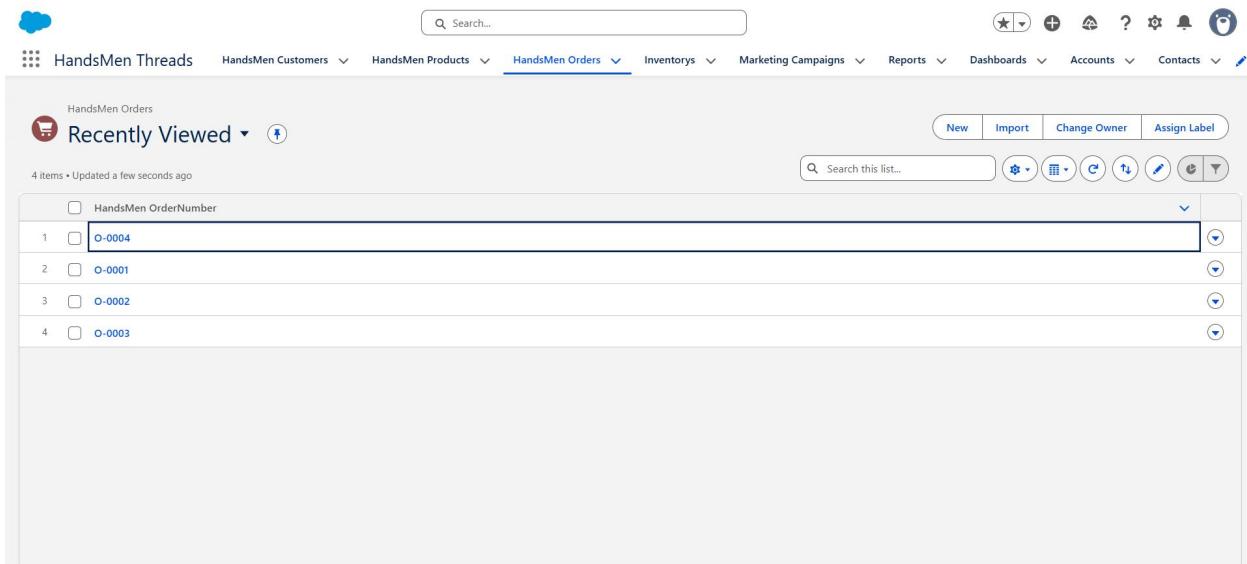


Fig: HandsMen Orders Page

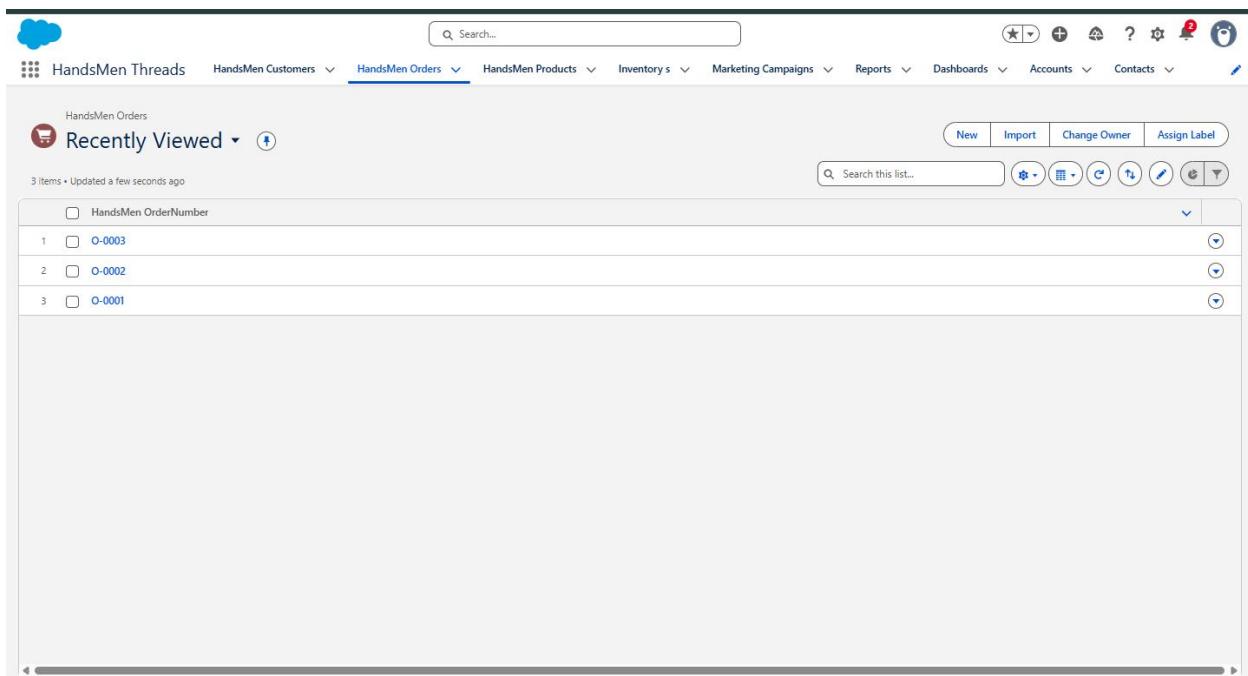


Fig: Order Details in HandsMen Orders Page

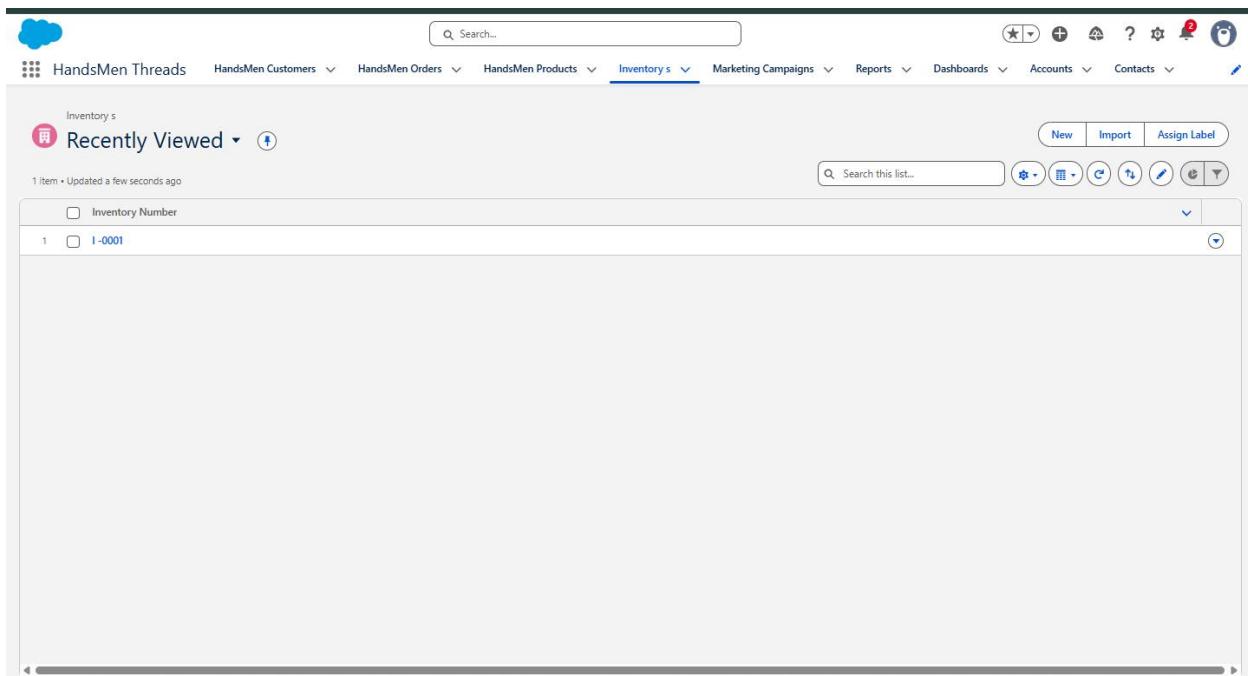


Fig: Inventorys Page in HandsMen Threads

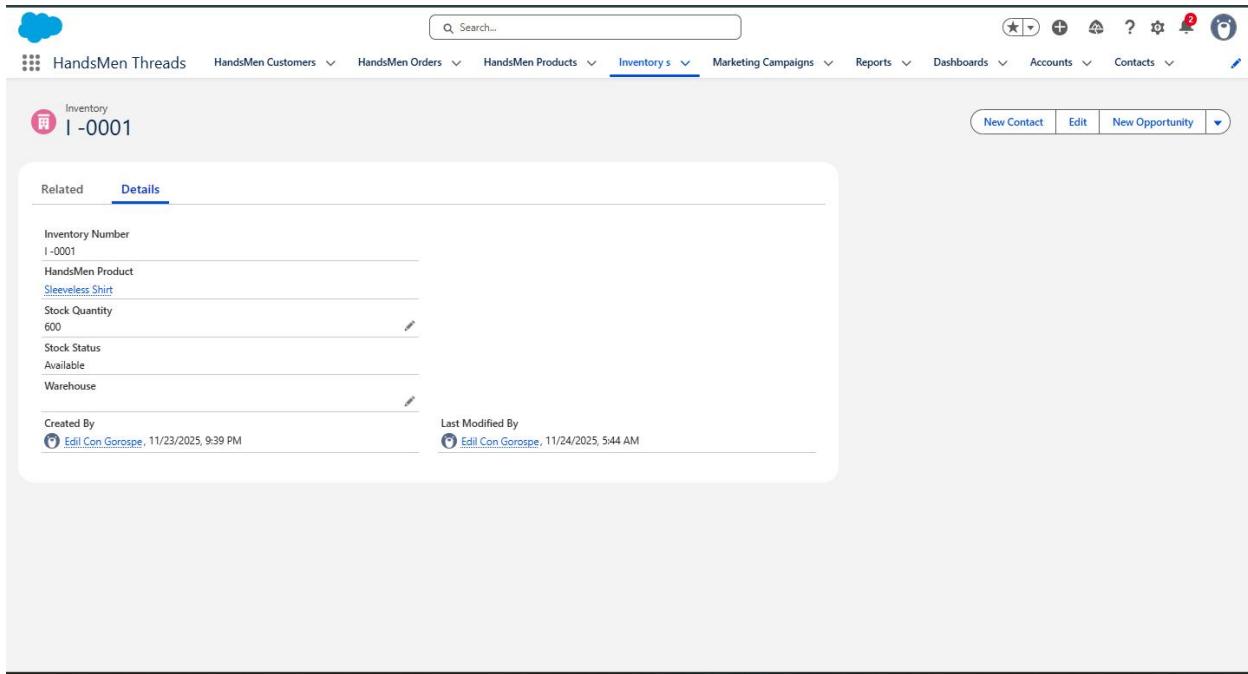


Fig: Inventory Details of a Specific Product

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>