

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

PROJECT OVERVIEW

HandsMen Threads, a dynamic organization in the fashion industry, is embarking on a Salesforce project designed to revolutionize their data management and elevate customer engagement. This initiative focuses on building a robust and scalable CRM data model tailored to store all pertinent business information—ranging from customer profiles and order histories to loyalty status and product catalogs. The system is strategically designed to support streamlined workflows, enable real-time data visibility, and ensure a seamless flow of information across departments such as sales, marketing, and customer service. Key features of the CRM include automated order processing, integrated loyalty management, personalized customer communication, and comprehensive analytics for sales forecasting and performance tracking. With these capabilities, HandsMen Threads aims to optimize operational efficiency, strengthen customer relationships, and support its continued growth in an increasingly competitive market.

OBJECTIVES

A key aspect of this project is the maintenance of data integrity directly from the user interface (UI). This feature will safeguard the accuracy and consistency of the data, which is crucial for informed decision-making and reliable business operations. The project will integrate several new processes into the business workflow to improve customer service and operational efficiency:

1. Enhance operational efficiency through automated record handling and streamlined workflows.
2. Improve customer engagement with dynamic, personalized email notifications.
3. Showcase Salesforce capabilities such as Lightning App Builder, Flows, Process Automation, and Custom Objects.
4. Implement a loyalty system that rewards returning customers and encourages repeat purchases.
5. Deliver a scalable and well-structured solution applicable to real-world retail and e-commerce industries.

SYSTEM REQUIREMENTS

1. Supported Browsers

- **Google Chrome** (Latest stable version, recommended)
- **Mozilla Firefox** (Latest stable version)
- **Microsoft Edge** (Latest stable version)

- **Safari** (Latest stable version, Mac only)
- **Internet Explorer 11** (Limited support, not recommended)

Note: At least 2 browsers installed in system.

2. Operating System Compatibility

- **Windows 8/9/10/11**
- **macOS (Latest versions)**
- **Linux (Limited support, browser-dependent)**
- **ChromeOS (Browser-based usage)**

3. Hardware Requirements

- **Processor:** Intel Core i3 or higher (or equivalent)
- **RAM:** Minimum **4GB RAM** (8GB or more recommended for better performance)
- **Storage:** At least **10GB free disk space**
- **Display Resolution:** Minimum **1366 x 768** (1920 x 1080 recommended)

4. Network Requirements

- **Stable internet connection** (Broadband, minimum 30 Mbps recommended)
- **No VPN restrictions** that block Salesforce access
- **Allow Salesforce domains in firewall settings** (e.g., [.salesforce.com](https://salesforce.com), [.force.com](https://force.com))

PROJECT PHASES

Phase 1: Architecture & Planning

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.
- Design email templates for notifications and customer communication.

Phase 2: Development

- Object and field creation.
- Implement automation (flows, process builders, Apex triggers).
- Set up data security and sharing rules.
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

Phase 3: Testing & QA

- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

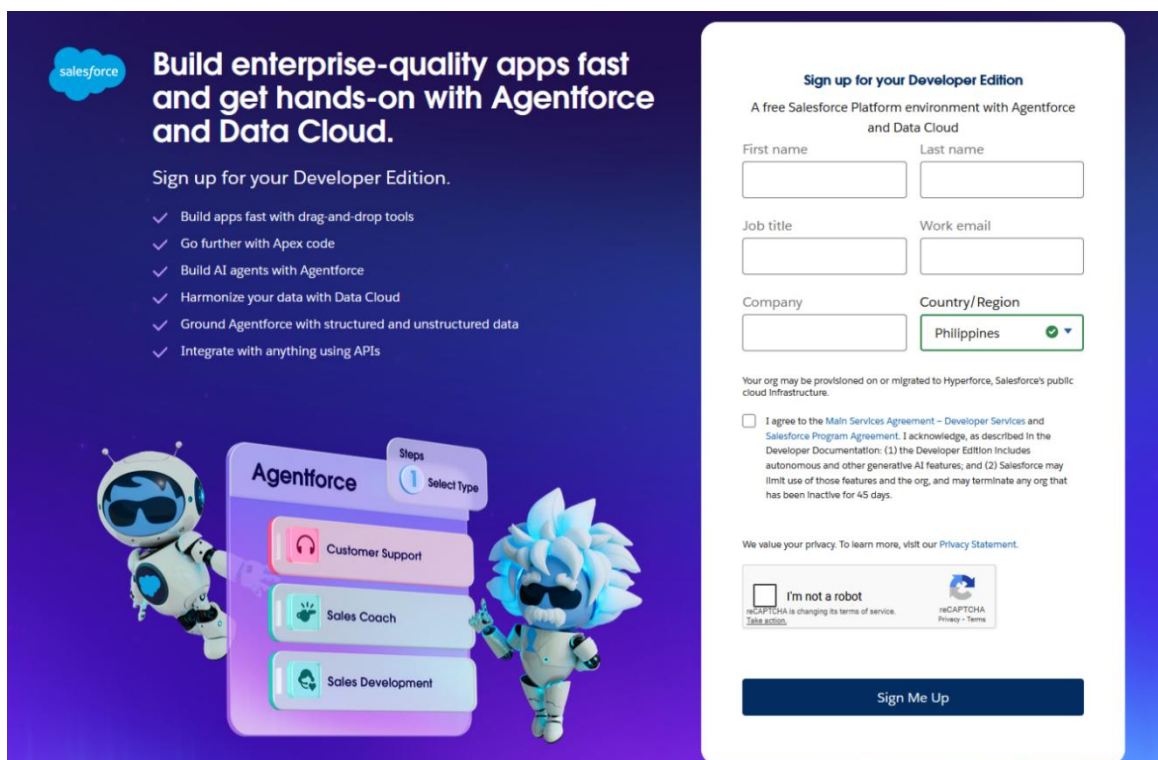
Phase 4: Deployment & Training

- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

PROJECT PHASE DEVELOPMENT

1. Salesforce Developer Org Setup

The development process began with the creation of a Salesforce Developer Org through <https://developer.salesforce.com/signup>, which served as the primary environment for building and testing the system. A new developer account was registered through the Salesforce Developer signup portal. Fill out the form to sign in to create the Developer Org Setup to start the capstone project. Once completed, verify the Salesforce Account through the email that you have typed in for confirmation.



The image shows the Salesforce Developer Edition signup page. On the left, there is a promotional banner with the Salesforce logo and the 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 are two cartoon robot characters and a "Steps" menu with "Select Type" highlighted. On the right, there is a form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form includes fields for "First name", "Last name", "Job title", "Work email", "Company", and "Country/Region" (with "Philippines" selected). Below the form, there is a checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement" and a link to the "Privacy Statement". At the bottom, there is a "Sign Me Up" button.

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name

Job title Work email

Company Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

☐ I'm not a robot ☐ [Privacy - Terms](#)

[Data action](#)

Sign Me Up

2. Creating Custom Objects

After setting up the org, the core data model for HandsMen Threads was established. Five key custom objects were created to represent essential business entities:

- A. **HandsMen Customer** – Stores customer profiles such as contact information, email, and loyalty status.

SETUP > OBJECT MANAGER			
HandsMen Customer			
Details	Fields & Relationships 11 Items, Sorted by Field Label		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Created By	CreatedById	Lookup(User)
Lightning Record Pages	Email	Email__c	Email
Buttons, Links, and Actions	FirstName	FirstName__c	Text(25)
Compact Layouts	Full Name	Full_Name__c	Formula (Text)
Field Sets	HandsMen Customer Name	Name	Text(80)
Object Limits	Last Modified By	LastModifiedById	Lookup(User)
Record Types	LastName	LastName__c	Text(25)
Related Lookup Filters	Loyalty Status	Loyalty_Status__c	Picklist
Search Layouts	Owner	OwnerId	Lookup(User,Group)
List View Button Layout	Phone	Phone__c	Phone
Restriction Rules	Total Purchases	Total_Purchases__c	Number(18, 0)
Scoping Rules			
Object Access			
Triggers			

- B. **HandsMen Product** – Contains product details such as stock availability, quantity, and pricing.

SETUP > OBJECT MANAGER			
HandsMen Product			
Details	Fields & Relationships 8 Items, Sorted by Field Label		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Created By	CreatedById	Lookup(User)
Lightning Record Pages	HandsMen Product Name	Name	Text(80)
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)
Compact Layouts	Order	Order__c	Lookup(HandsMen Order)
Field Sets	Owner	OwnerId	Lookup(User,Group)
Object Limits	Price	Price__c	Currency(18, 0)
Record Types	SKU	SKU__c	Text(50)
Related Lookup Filters	Stock Quantity	Stock_Quantity__c	Number(18, 0)
Search Layouts			
List View Button Layout			

- E. **Marketing Campaign** – Manages promotional activities and customer engagement initiatives.

SETUP > OBJECT MANAGER

Marketing Campaign

Details	Fields & Relationships <div>7 Items, Sorted by Field Label</div> <div>Quick Find</div>		
Fields & Relationships			
Page Layouts			
Lightning Record Pages			
Buttons, Links, and Actions			
Compact Layouts			
Field Sets			
Object Limits			
Record Types			
Related Lookup Filters			
	FIELD LABEL	FIELD NAME	DATA TYPE
	Created By	CreatedBy	Lookup(User)
	End Date	End_Date__c	Date
	HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)
	Last Modified By	LastModifiedBy	Lookup(User)
	Marketing Campaign Number	Name	Auto Number
	Owner	OwnerId	Lookup(User,Group)
	Start Date	Start_Date__c	Date

3. Creating the Lightning App

A specialized HandsMen Threads Lightning App was created to bring all essential objects, tabs, and tools together in one centralized workspace. It became the main interface for staff, allowing them to handle customers, products, orders, inventory, and campaigns with ease. The app's layout was intentionally structured to reduce unnecessary navigation and support smoother day-to-day operations.

HandsMen Threads

HandsMen Customers HandsMen Orders HandsMen Products Inventories Marketing Campaigns Reports Dashboards Accounts Contacts

HandsMen Customers

Recently Viewed

New Import Change Owner Assign Label

7 items • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	HandsMen Customer Name	
1	<input type="checkbox"/> Justine Raymundo	
2	<input type="checkbox"/> John Doe	
3	<input type="checkbox"/> Stephen King	
4	<input type="checkbox"/> Daniel Leon	
5	<input type="checkbox"/> Test Three	
6	<input type="checkbox"/> Test One	
7	<input type="checkbox"/> Test Two	

4. Validation Rules

To uphold data accuracy within the Salesforce system, multiple validation rules were applied to the custom objects. These rules help block the entry of incomplete, inconsistent, or incorrect information before it can be saved. By enforcing these requirements at the user interface level, the platform ensures clean, dependable records that improve both reporting quality and the efficiency of automated processes.

4.1 Required Customer Information

A customer must input their email to be able to transact and order products in the store.

4.2 Valid Email Format

A customer must have a valid email that follows the proper email structure (e.g., name@example.com). This reduces risks associated with invalid contact information that may affect email notifications.

4.3 Number of Stock Quantity of Products

The number of stock quantity of product must not be less than or equal to zero.

4.4 Total Amount in Order

The total amount purchased by the customer must not be less than or equal to zero.

5. User Creation, Roles, and Profiles

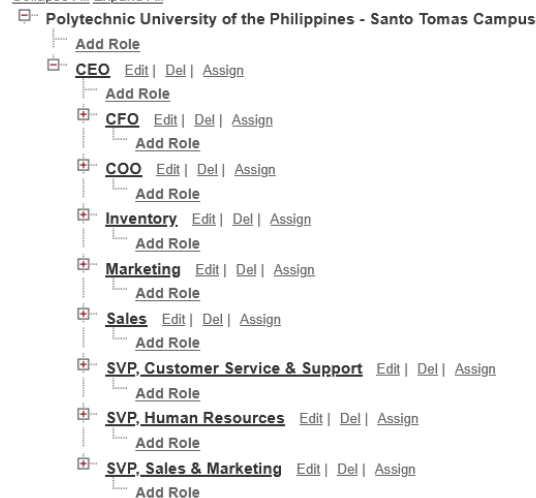
Roles were created under the CEO, namely the Sales, Inventory, and Marketing. Additionally, each role was assigned a user that act as managers. After that, they were granted specific permission sets based on their position.

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](#)



After completing the roles, the users are then created to assign each of them to the newly created roles as mentioned above.

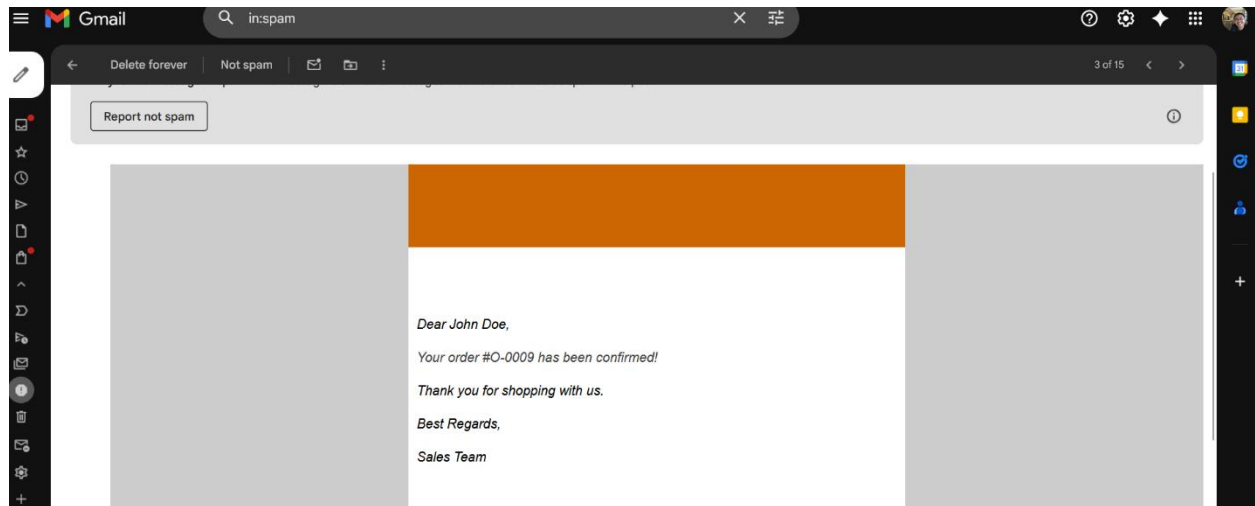
<input type="checkbox"/>	Edit	Mikaelson, Kol	kmika	kmikaredmonkey@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Edit	Mikaelson, Niklaus	nmika	nmikabluezoo@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Edit	Mikaelson, Richard	rmika	justineraymundocatto23@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Edit	Raymundo, Justine	jus	justineraymundo18897@agentforce.com		<input checked="" type="checkbox"/>	System Administrator

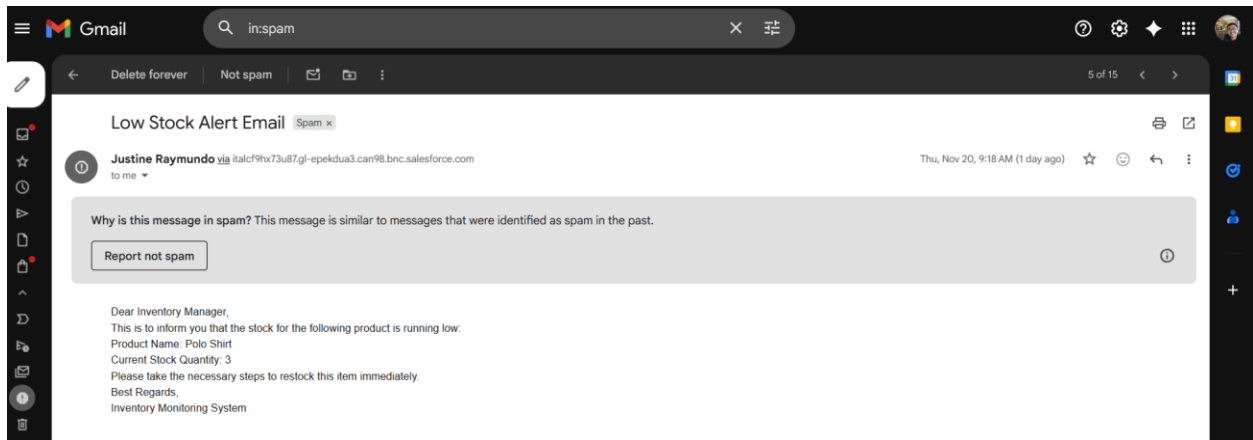
6. Email Templates and Email Alerts

To facilitate automated customer communication, a set of well-designed email templates was developed. These included:

- **Order Confirmation Template** – Automatically sent to customers once an order is submitted.
- **Low Stock Alert Template** – Triggered when inventory drops below a specified threshold.
- **Loyalty Program Templates** – Used to notify customers of changes in their loyalty status.

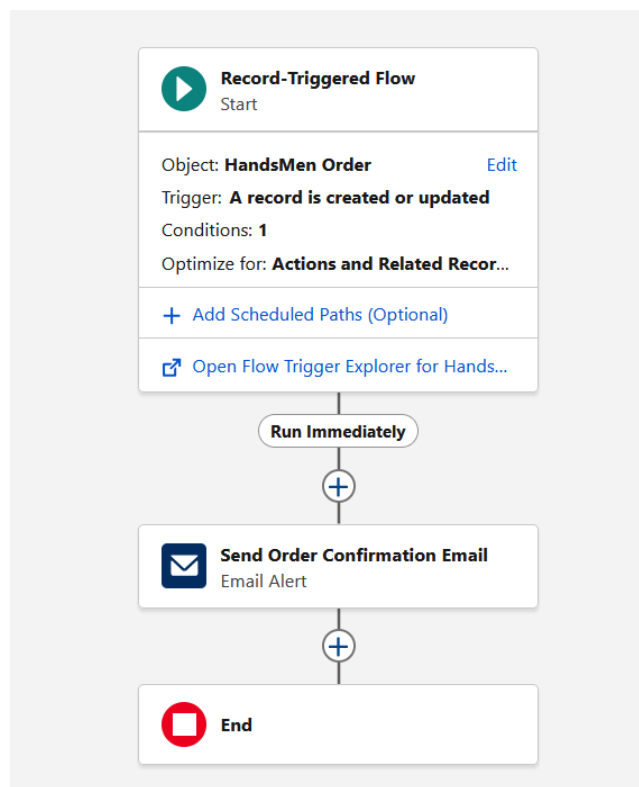
Email Alerts were then configured to leverage these templates within Flows and other automation processes, allowing the system to deliver seamless, automated messaging across various business situations.



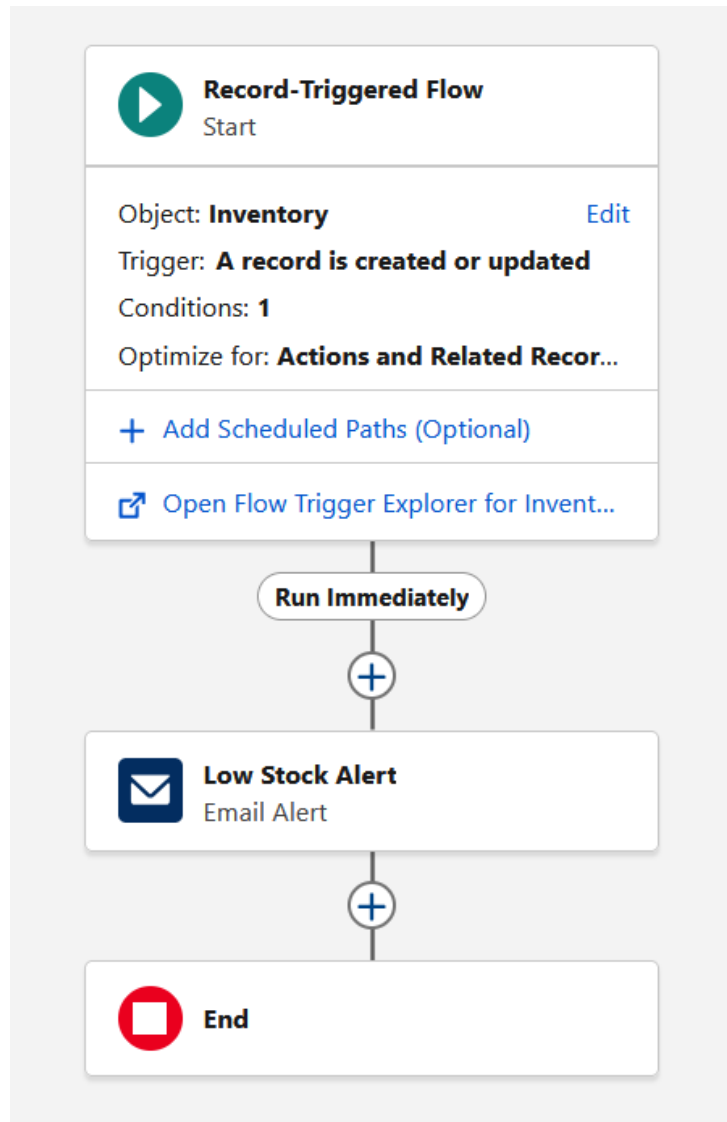


7. Flow Implementation

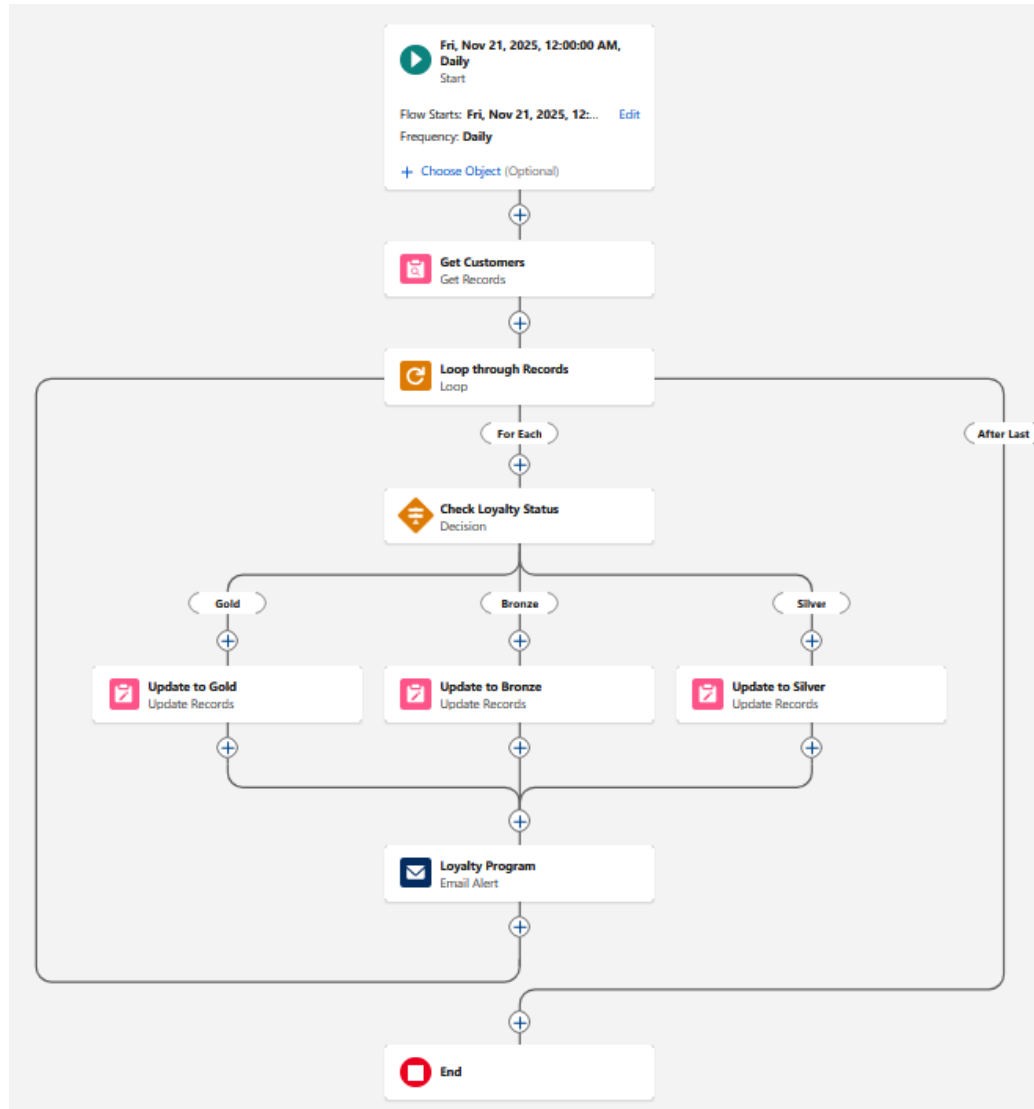
A. Order Confirmation Email (Record-Triggered) – A customer will receive an Order Confirmation Email whenever they have confirmed their order in HandsMen Threads.



B. Low Stock Alert (Record-Triggered Flow) – The inventory manager will receive a Low Stock Email whenever there are products that are less than five left in the warehouse.



C. Loyalty Status Update (Scheduled Flow) – A customer will receive a Loyalty Program Email when they reached a certain milestone of Total Purchases. It was scheduled to update daily at midnight.



8. Apex Triggers and Automation

To accommodate business processes that exceeded the capabilities of Salesforce's declarative tools, Apex was integrated into the solution. Apex offered the control, performance, and adaptability required for more intricate operations. As part of the automation framework, three Apex Triggers were created, each designed to manage a critical functional requirement within the HandsMen Threads system.

A. Order Confirmation Trigger

A trigger was developed for the HandsMen Order object to automatically handle back-end operations whenever a new order is created. This logic enabled the system to generate confirmation details and run required server-side processes before or after the record was saved. It served as the core mechanism supporting more advanced order workflows, including email notifications and inventory synchronization.

B. Inventory Update Trigger

An Apex trigger was deployed on the Inventory to update product stock levels when an order was confirmed. This automation deducted the purchased quantities from the inventory in real time, ensuring accurate stock tracking. With this process in place, the system avoided overselling and strengthened visibility between sales and warehouse operations.

C. Loyalty Status Update Trigger

A trigger was implemented on the HandsMen Customer object to adjust a customer's Loyalty Status according to their cumulative purchases. When a qualifying order was recorded, the trigger recalculated the customer's total spending and assigned the correct loyalty tier. This ensured that loyalty-based perks, such as discounts or rewards, were applied consistently and without manual intervention.

HANDSMEN THREADS APPLICATION SCREENSHOTS

The screenshot displays the 'HandsMen Threads' application interface. At the top, there is a navigation bar with a search bar and various icons. Below the navigation bar, the 'HandsMen Customers' section is active, showing a 'Recently Viewed' list. The list contains 6 items, updated 40 minutes ago. The items are:

	HandsMen Customer Name	
1	<input type="checkbox"/> Stephen King	▼
2	<input type="checkbox"/> Daniel Leon	▼
3	<input type="checkbox"/> Test Three	▼
4	<input type="checkbox"/> Test One	▼
5	<input type="checkbox"/> John Doe	▼
6	<input type="checkbox"/> Test Two	▼

At the top right of the list, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the list, there is a search bar and a set of icons for filtering and sorting.

Image 1: HandsMen Threads Application

The screenshot shows the 'New HandsMen Customer' form. The form is titled 'New HandsMen Customer' and includes a legend indicating that '*' denotes required information. The form is divided into sections for 'Information' and 'Owner'.

Information Section:

- * HandsMen Customer Name:** A required text field with a red border and a red 'X' icon. Below it, a red message says 'Complete this field.'
- Email:** A text field.
- Phone:** A text field.
- Loyalty Status:** A dropdown menu with the option '--None--' selected.
- FirstName:** A text field.
- LastName:** A text field.
- Total Purchases:** A text field.

Owner Section:

- Owner:** A dropdown menu with the option 'Justine Raymundo' selected.

At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Image 2: HandsMen Customer Creation Form

HandsMen Customer

John Doe

Related

Details

HandsMen Customer Name

John Doe

Email

justineraymundo18@gmail.com

Phone

Loyalty Status

Silver

FirstName

John

LastName

Doe

Full Name

John Doe

Total Purchases

750

Created By

Justine Raymundo

, 11/19/2025, 1:07 AM

Owner

Justine Raymundo

Last Modified By

OrgFarm EPIC

, 11/21/2025, 12:00 AM

Image 3: Customer Detail Page

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Order

Search HandsMen Orders...

SKU

Price

Stock Quantity

Owner

Justine Raymundo

Cancel

Save & New

Save

Image 4: HandsMen Product Creation Form

HandsMen Product

Polo Shirt

Related

Details

HandsMen Product Name

Polo Shirt

Order

SKU

ZO123ABC

Price

\$25

Stock Quantity

1,000

Created By

Justine Raymundo, 11/19/2025, 12:43 AM

Owner

Justine Raymundo

Last Modified By

Justine Raymundo, 11/19/2025, 12:43 AM

Image 5: Product Detail Page

Customers HandsMen Orders HandsMen Products Inventories Marketing Campaigns Reports Dash

New Inventory

* = Required Information

Information

Inventory Number

* Product

Search HandsMen Products...

Warehouse

Stock Quantity

Cancel

Save & New

Save

Image 6: HandsMen Inventory Creation Form

Inventory

I -0001

Related

Details

Inventory Number

I -0001

Product

[Dry Fit](#)

Warehouse

Stock Quantity

4

Stock Status

Low Stock

Created By

Justine Raymundo

 · 11/19/2025, 2:07 AM

Last Modified By

Justine Raymundo

 · 11/19/2025, 5:17 PM

Image 7: Inventory Detail Page

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

Justine Raymundo

Customer

Search HandsMen Customers...

Status

--None--

Quantity

Total Amount

*Customer Email

HandsMen Product

Search HandsMen Products...

Cancel

Save & New

Save

Image 8: HandsMen Order Creation Form



HandsMen Order

O-0012

Related

Details

HandsMen OrderNumber

O-0012

Owner

[Justine Raymundo](#)



Customer

[Stephen King](#)



Status

Confirmed



Quantity

750



Total Amount

44,250



Customer Email

justineraymundo18@gmail.com



HandsMen Product

[Tuxedo](#)



Created By

[Justine Raymundo](#), 11/19/2025, 6:44 PM

Last Modified By

[Justine Raymundo](#), 11/19/2025, 7:03 PM

Image 9: Order Detail Page

Dear Stephen King,

Your order #O-0012 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Image 10: Order Confirmation Email Received by the Customer

RECOMMENDATIONS

1. AI-Powered Product Recommendations (Einstein)

- Leverage Salesforce Einstein to analyze customer purchase patterns and recommend products tailored to individual preferences.
- Enhance upselling and cross-selling opportunities directly within the Order and Customer pages.

2. Enhanced Dashboards and Forecasting Tools

- Build dynamic dashboards that show sales performance, customer trends, top products, and loyalty engagement metrics.
- Integrate forecasting to help management predict demand and plan promotions.

3. End-to-End Loyalty Program Expansion

- Introduce tier-based rewards, expiration reminders, and automated loyalty upgrade notifications.
- Strengthens customer retention and encourages higher spending.

4. Automated Return and Exchange Management

- Add a workflow or dedicated object for handling product returns and exchanges.
- Provides traceability, improves customer satisfaction, and maintains inventory accuracy.

CONCLUSION

HandsMen Threads exemplifies a sophisticated and functional Salesforce-based retail management solution. It empowers users to efficiently manage orders, track customer loyalty, and maintain professional communication with minimal manual work. This project highlights the strengths of the Salesforce platform in meeting modern digital business needs while showcasing your team's mastery of low-code development, automation, and UI refinement.