

# **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 enhance customer relations. The project involves building a robust data model tailored to store all pertinent business data, ensuring a seamless flow of information across the organization.

## **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 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.

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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.

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## **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.
- B. **HandsMen Product** – Contains product details such as stock availability, quantity, and pricing.
- C. **HandsMen Order** – Captures transaction information, including product orders, progress tracking, and order total.
- D. **Inventory** – Tracks stock levels and supports inventory monitoring and warehouse operations.
- E. **Marketing Campaign** – Manages promotional activities and customer engagement initiatives.

## **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.

## **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 have 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.

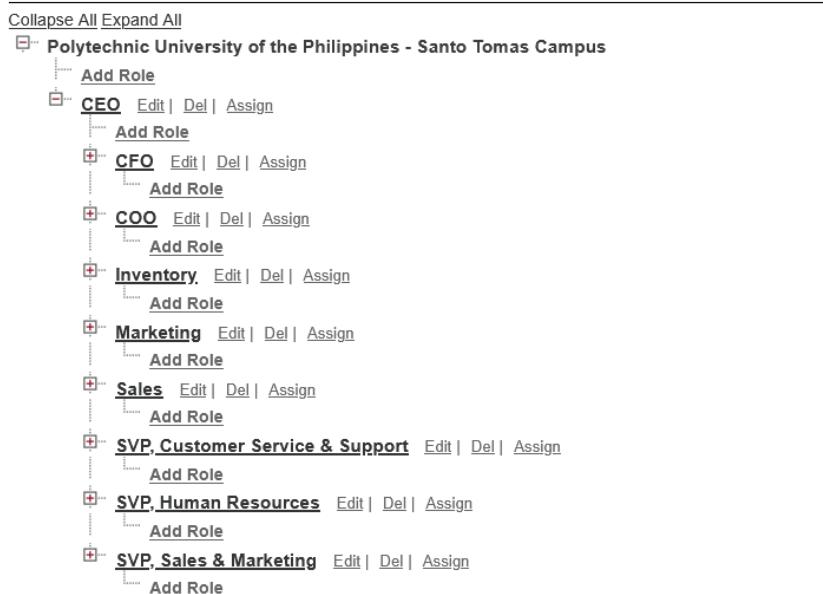
## 5. User Creation, Roles, and Profiles

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



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

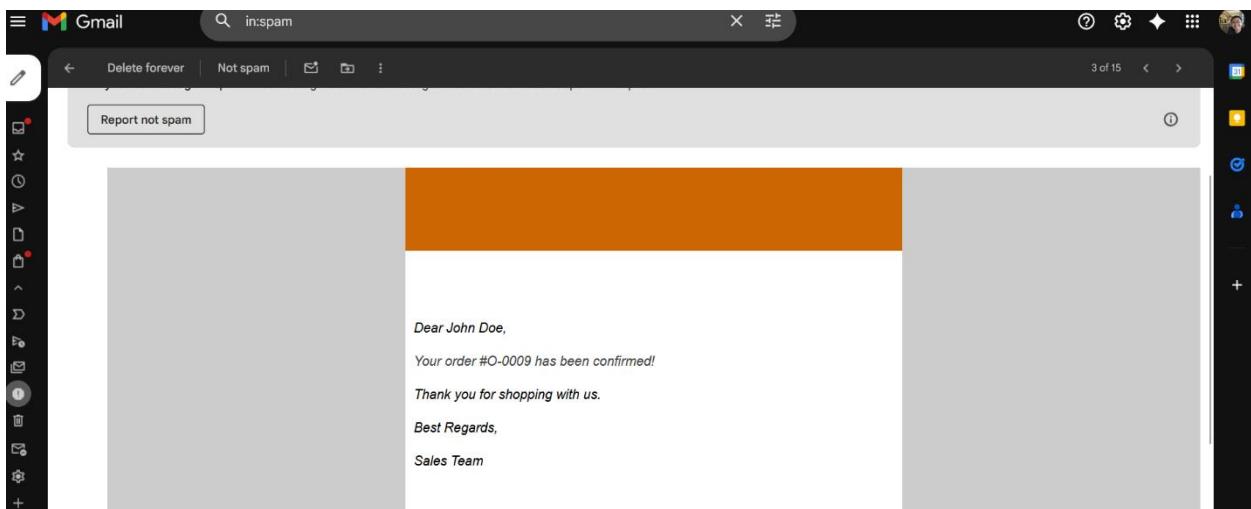
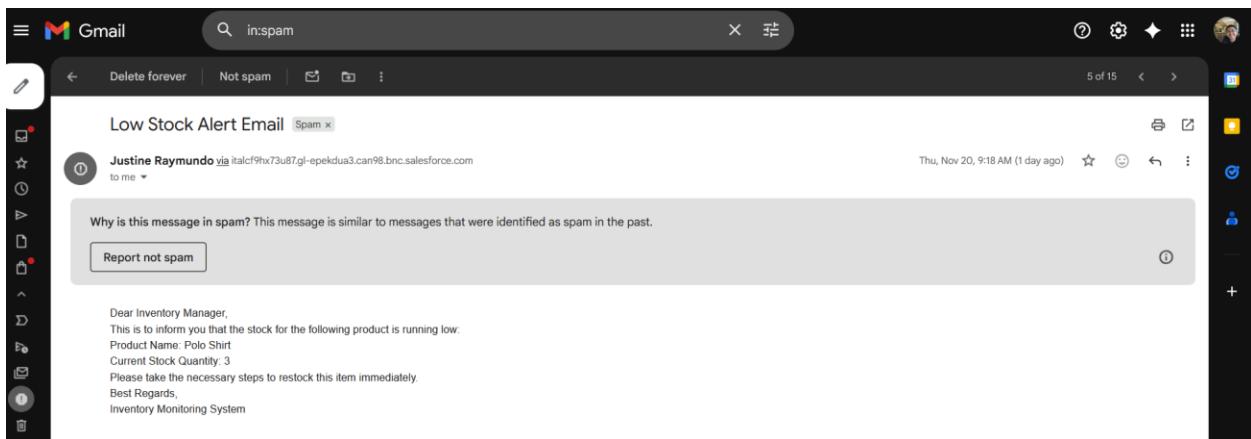
<input type="checkbox"/>	<a href="#">Edit</a>	Mikaelson, Kol	kmika	kmikaredmonkey@gmail.com	<a href="#">Inventory</a>	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	<a href="#">Edit</a>	Mikaelson, Niklaus	nmika	nmikabluezoo@gmail.com	<a href="#">Sales</a>	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	<a href="#">Edit</a>	Mikaelson, Richard	rmika	justineraymundocatto23@gmail.com	<a href="#">Marketing</a>	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	<a href="#">Edit</a>	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:

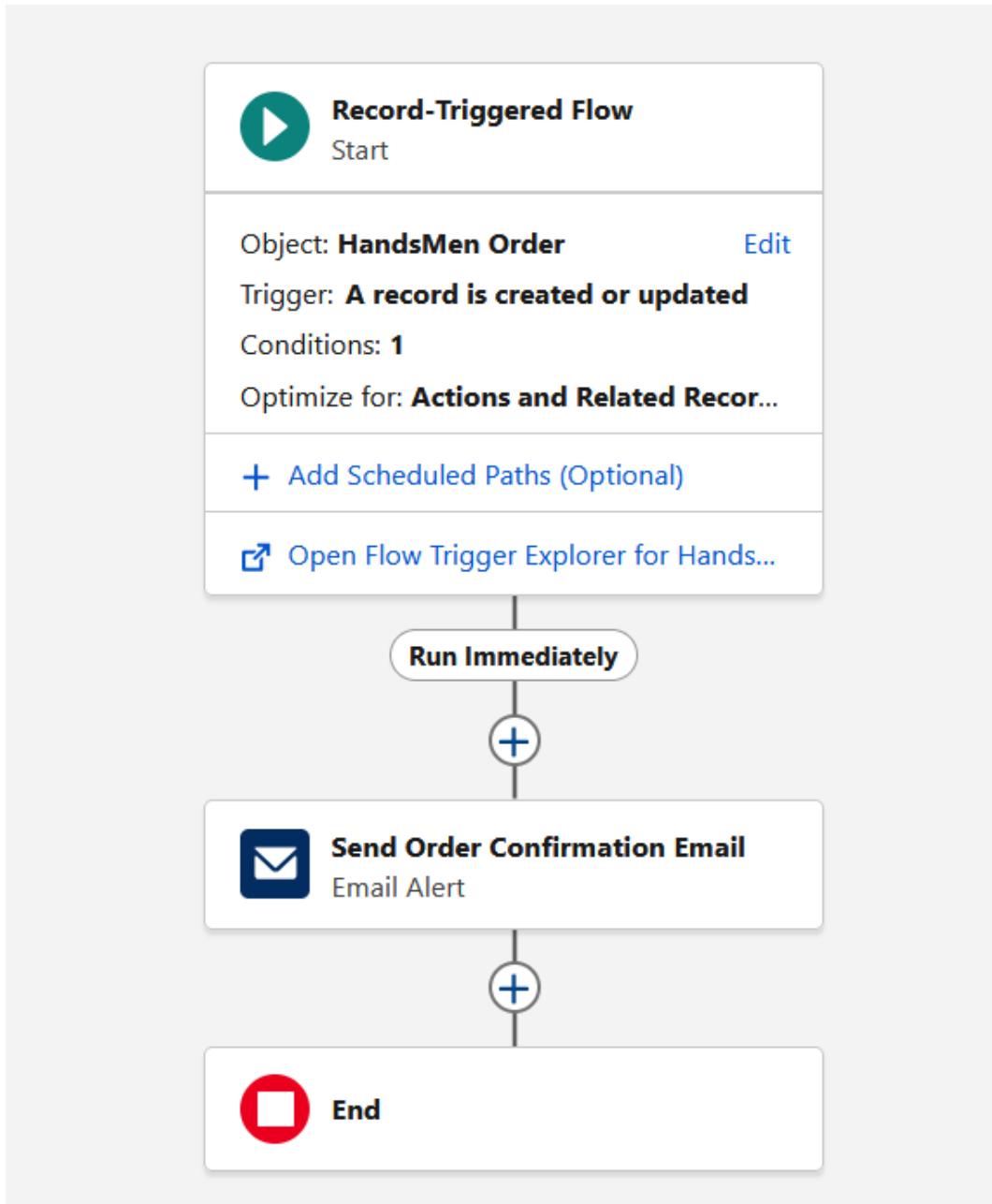
- **Order Confirmation Template** – Automatically sent to customers once an order is submitted.
- **Low Stock Alert Template** – Triggered when inventory drops below a specified threshold.
- **Loyalty Program Templates** – Used to notify customers of changes in their loyalty status.

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.

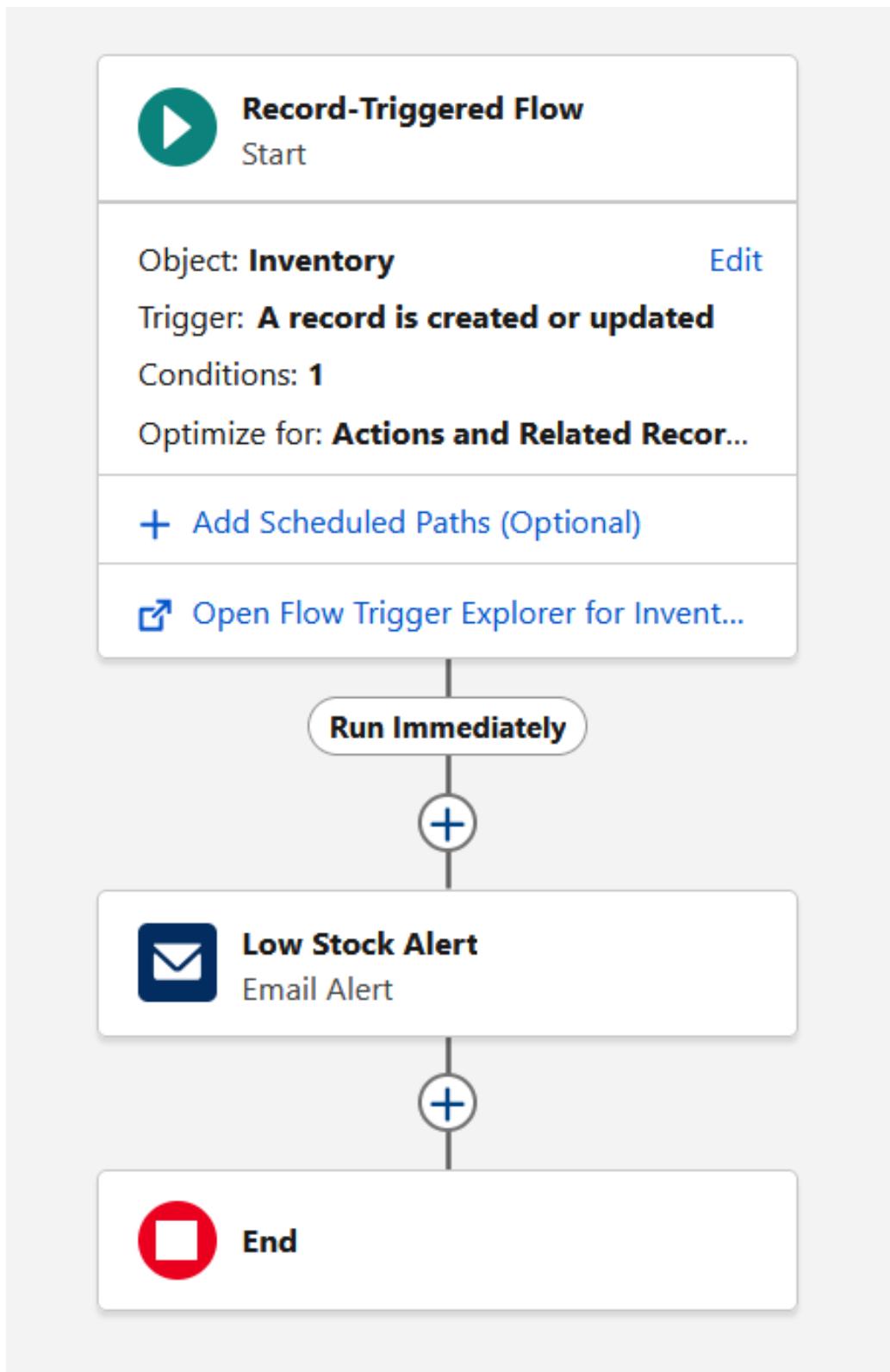


## 7. Flow Implementation

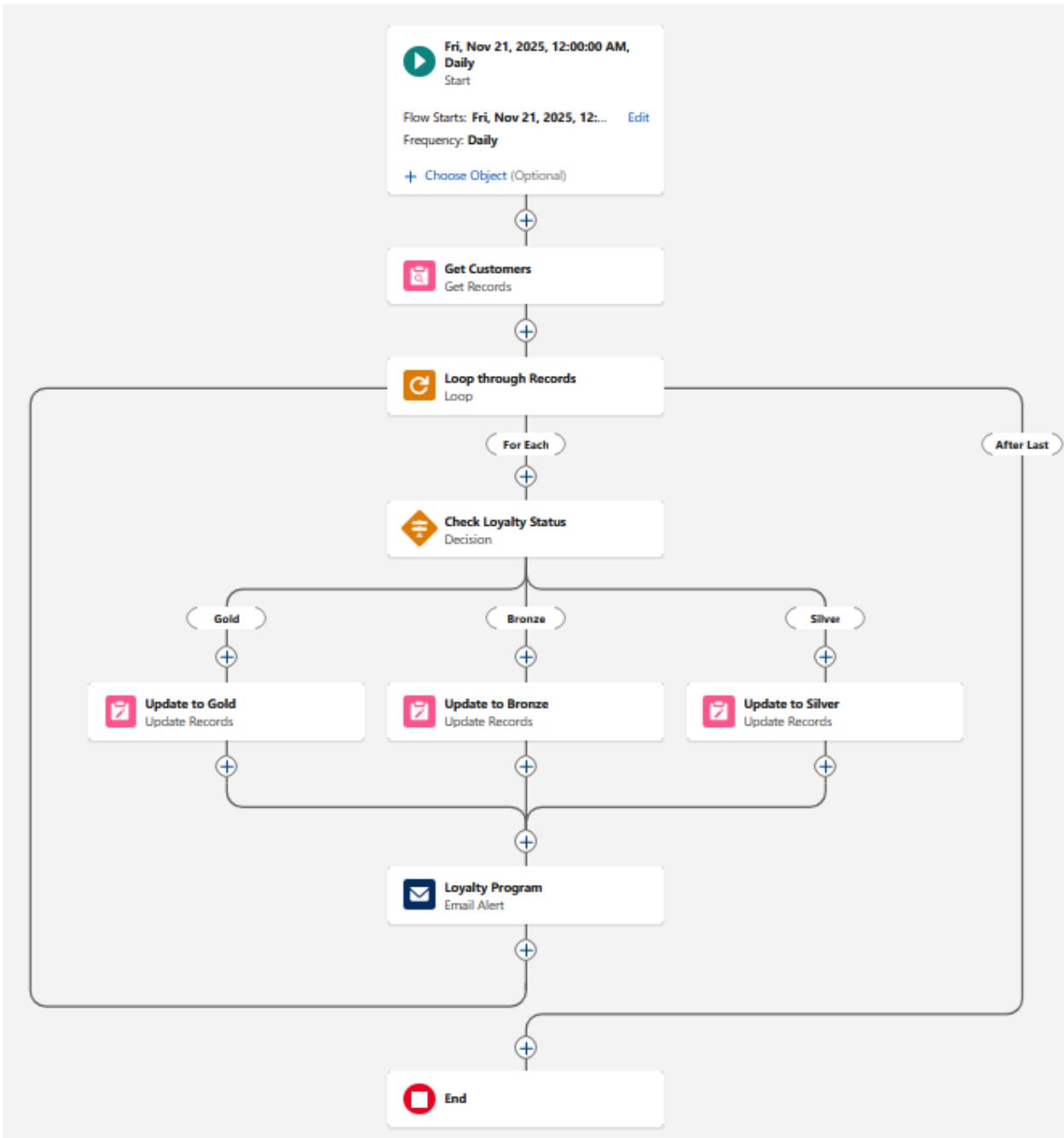
### A. Order Confirmation Email (Record-Triggered)



## B. Low Stock Alert (Record-Triggered Flow)



### C. Loyalty Status Update (Scheduled Flow)



## **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 either the Inventory or Order object (based on the chosen architecture) to update product stock levels when an order is submitted. 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 or HandsMen Order 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.

## **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.

## HANDSMEN THREADS APPLICATION SCREENSHOTS

The screenshot shows the HandsMen Threads application interface. At the top, there is a navigation bar with icons for cloud storage, search, and various application modules like HandsMen Customers, Orders, Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, Contacts, and a settings gear. Below the navigation bar is a sub-navigation menu for 'HandsMen Customers' with options like 'Recently Viewed' and a search bar. The main content area displays a list of 'HandsMen Customer Name' entries, each with a checkbox and a dropdown arrow. The entries are: 1. Stephen King, 2. Daniel Leon, 3. Test Three, 4. Test One, 5. John Doe, and 6. Test Two. There are also buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A secondary search bar at the bottom allows searching within this list.

**Image 1: HandsMen Threads Application**

The screenshot shows a modal dialog titled 'New HandsMen Customer'. The form has a header note '\* = Required Information'. It contains several input fields: 'HandsMen Customer Name' (a required field indicated by a red border and error message 'Complete this field.'), 'Email' (an optional field), 'Phone' (an optional field), 'Loyalty Status' (a dropdown menu with options like '--None--'), 'FirstName' (an optional field), and 'LastName' (an optional field). At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save & New' button is highlighted in blue.

**Image 2: HandsMen Customer Creation Form**

HandsMen Customer  
 John Doe

Related [Details](#)

HandsMen Customer Name	John Doe	Owner	 Justine Raymundo
Email	<a href="mailto:justineraymundo18@gmail.com">justineraymundo18@gmail.com</a>		
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	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	Owner
<input type="text"/>	 Justine Raymundo
Order	<input type="text"/> 
SKU	<input type="text"/>
Price	<input type="text"/>
Stock Quantity	<input type="text"/>

[Cancel](#) [Save & New](#) [Save](#)

**Image 4: HandsMen Product Creation Form**

HandsMen Product  
**Polo Shirt**

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<a href="#">Related</a>	<a href="#">Details</a>
<hr/>	
HandsMen Product Name	Owner
Polo Shirt	<a href="#">Justine Raymundo</a>
<hr/>	
Order	
<hr/>	
SKU	
ZO123ABC	
Price	
\$25	
Stock Quantity	
1,000	
Created By	Last Modified By
<a href="#">Justine Raymundo</a> , 11/19/2025, 12:43 AM	<a href="#">Justine Raymundo</a> , 11/19/2025, 12:43 AM
<hr/>	

**Image 5: Product Detail Page**

Customers ▾ HandsMen Orders ▾ HandsMen Products ▾ **Inventorys** ▾ Marketing Campaigns ▾ Reports ▾ Dashboards

New Inventory

\* = Required Information

**Information**

Inventory Number

\* Product

Search HandsMen Products...

Warehouse

Stock Quantity

**Image 6: HandsMen Inventory Creation Form**

Inventory  
I -0001

Related Details

Inventory Number  
I -0001

Product  
[Dry Fit](#)

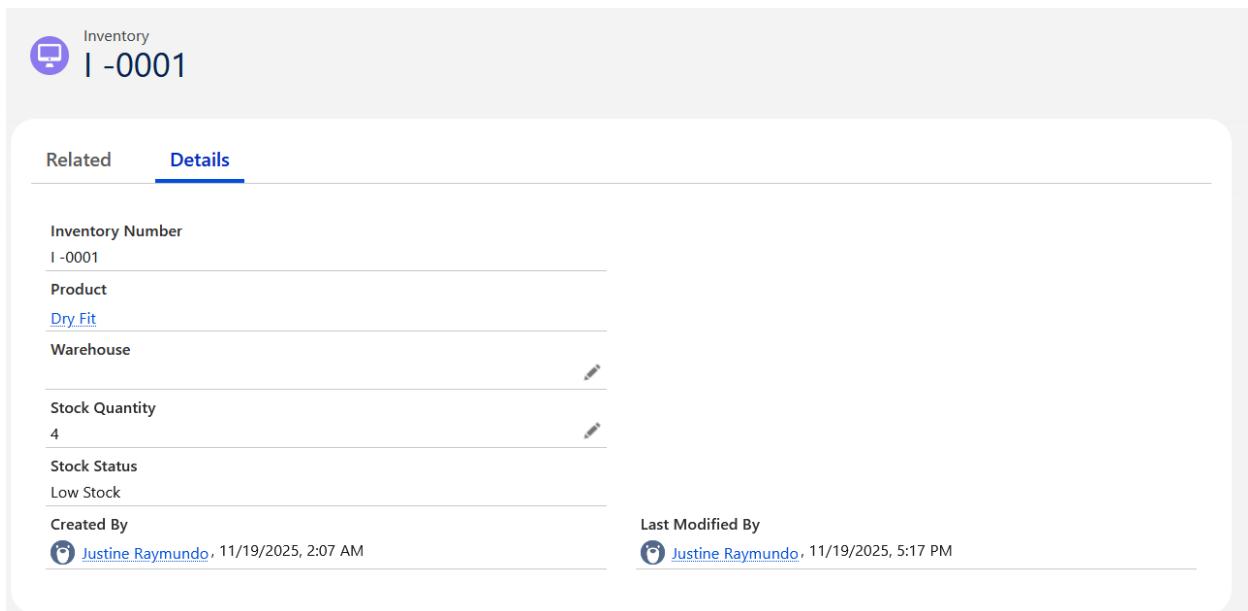
Warehouse

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--

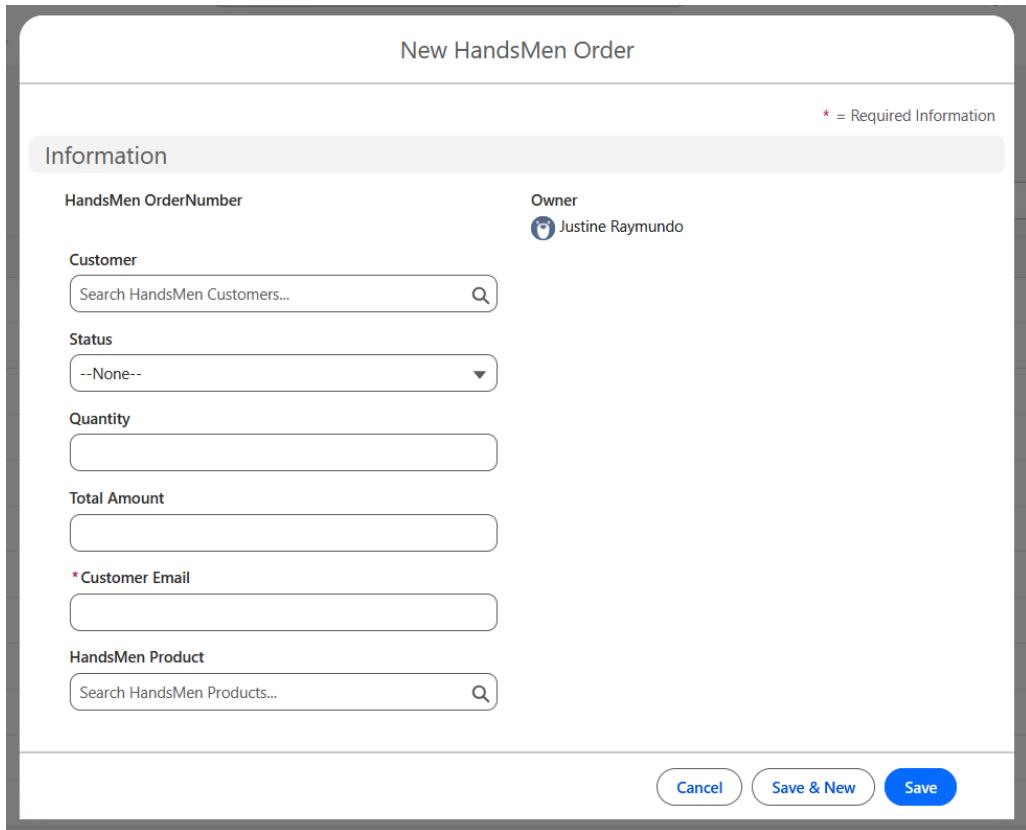
Quantity

Total Amount

\*Customer Email

HandsMen Product

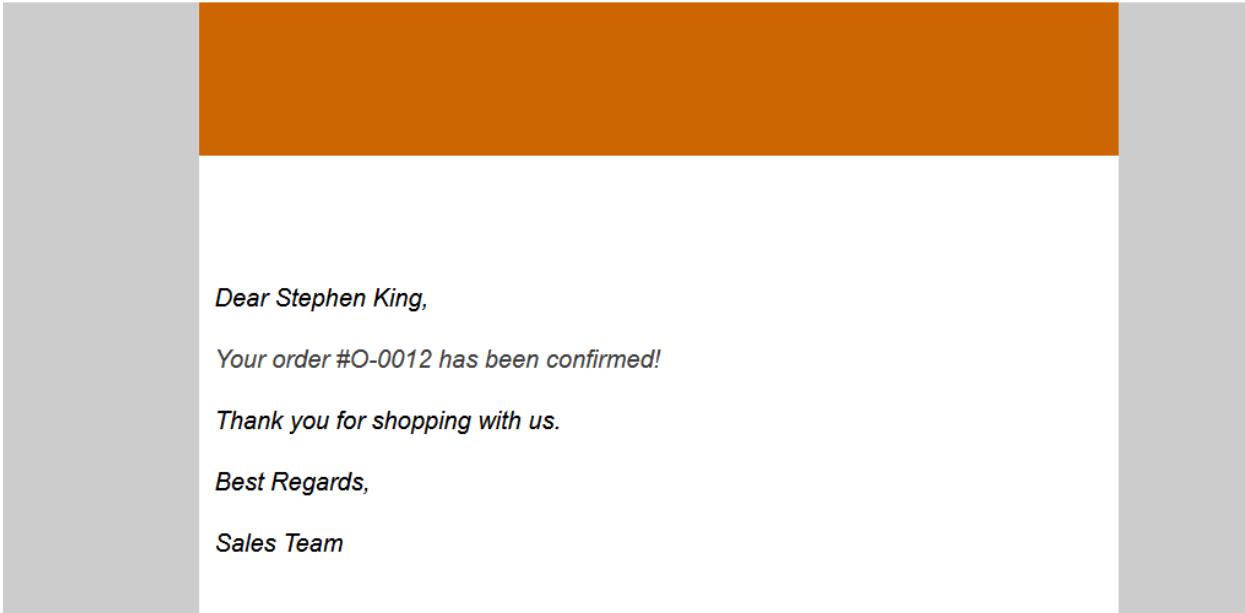
Search HandsMen Products... 



**Image 8: HandsMen Order Creation Form**

 HandsMen Order	O-0012
Related	<b>Details</b>
HandsMen OrderNumber	Owner
O-0012	 <a href="#">Justine Raymundo</a> 
Customer	
<a href="#">Stephen King</a>	
Status	
Confirmed	
Quantity	
750	
Total Amount	
44,250	
Customer Email	
<a href="mailto:justineraymundo18@gmail.com">justineraymundo18@gmail.com</a>	
HandsMen Product	
<a href="#">Tuxedo</a>	
Created By	Last Modified By
 <a href="#">Justine Raymundo</a> , 11/19/2025, 6:44 PM	 <a href="#">Justine Raymundo</a> , 11/19/2025, 7:03 PM

**Image 9: Order Detail Page**



**Image 10: Order Confirmation Email Received by the Customer**