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*, .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.

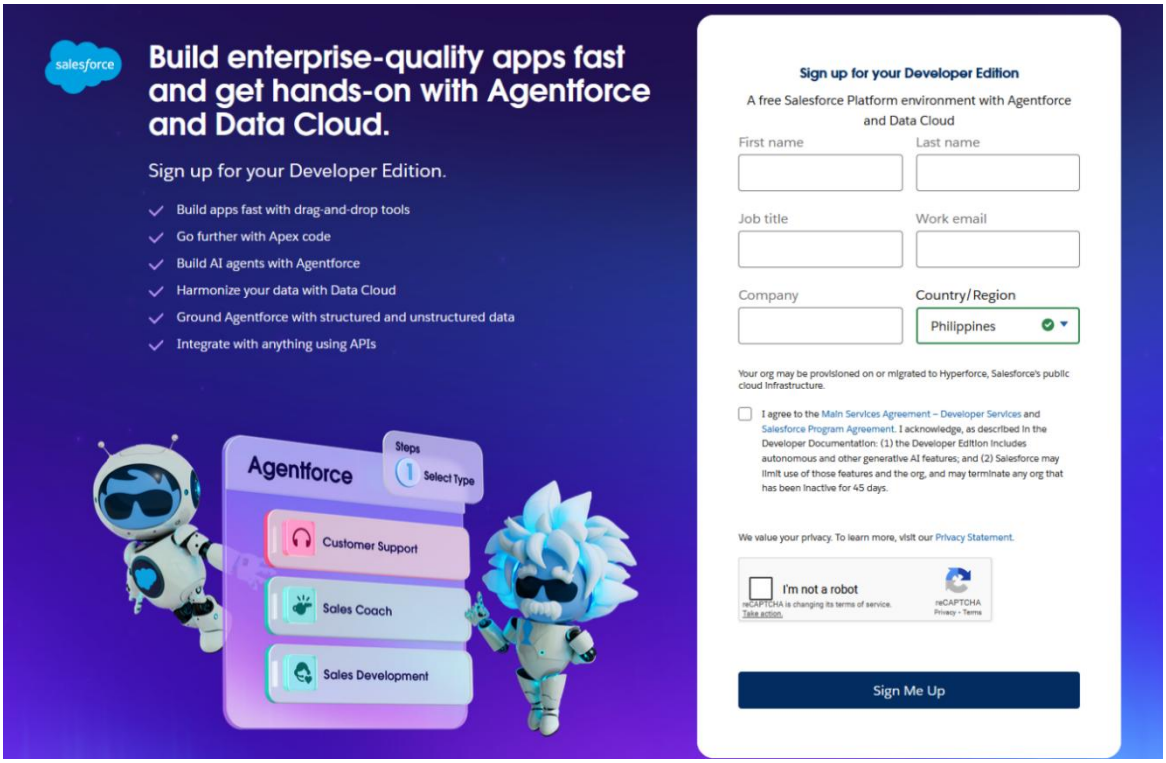
Phase 4: Deployment & Training

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

PROJECT PHASE DEVELOPMENT

1. Salesforce Developer Org Setup

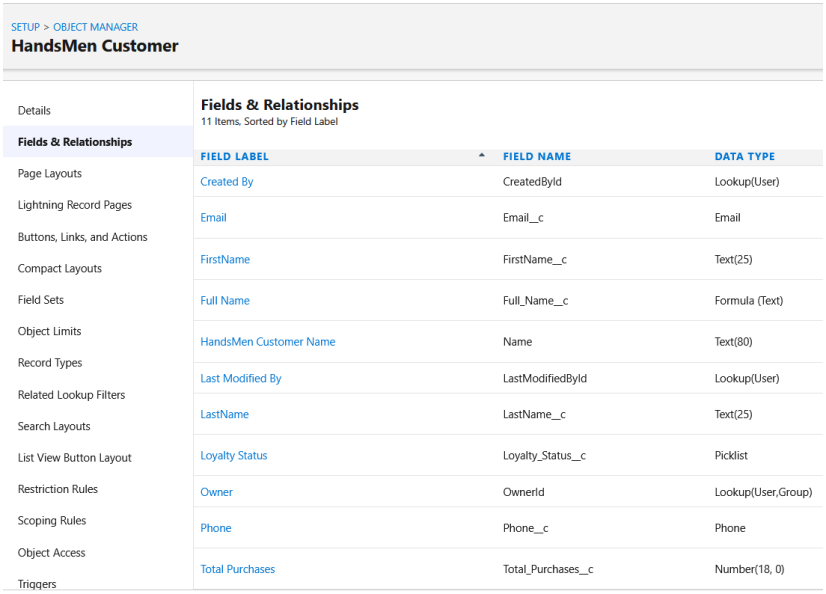
The development process began with the creation of a Salesforce Developer Org through https://developer.salesforce.com/signup, which served as the primary environment for building and testing the system. A new developer account was registered through the Salesforce Developer signup portal. Fill out the 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.



2. Creating Custom Objects

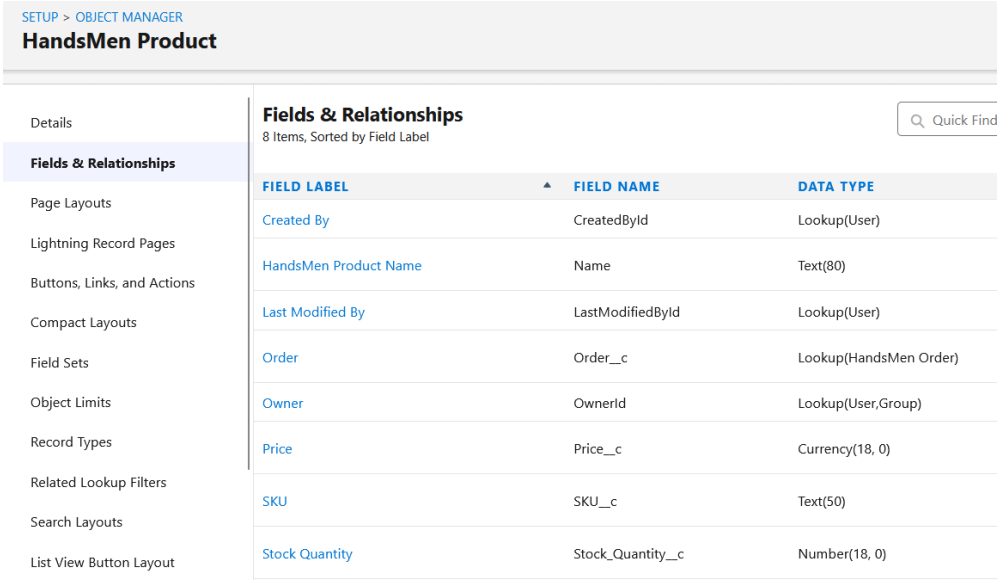
After setting up the org, the core data model for HandsMen Threads was established. Five key custom objects were created to represent essential business entities:

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



FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Email	Email__c	Email
FirstName	FirstName__c	Text(25)
Full Name	Full_Name__c	Formula (Text)
HandsMen Customer Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
LastName	LastName__c	Text(25)
Loyalty Status	Loyalty_Status__c	Picklist
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
Total Purchases	Total_Purchases__c	Number(18, 0)

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



FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
HandsMen Product Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
Order	Order__c	Lookup(HandsMen Order)
Owner	OwnerId	Lookup(User,Group)
Price	Price__c	Currency(18, 0)
SKU	SKU__c	Text(50)
Stock Quantity	Stock_Quantity__c	Number(18, 0)

C. **HandsMen Order** – Captures transaction information, including product orders, progress tracking, and order total.

SETUP > OBJECT MANAGER

HandsMen Order

- 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
- Restriction Rules
- Scoping Rules
- Object Access

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Customer	Customer__c	Lookup(HandsMen Customer)
Customer Email	Customer_Email__c	Email
HandsMen OrderNumber	Name	Auto Number
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Quantity	Quantity__c	Number(18, 0)
Status	Status__c	Picklist
Total Amount	Total_Amount__c	Number(18, 0)

D. **Inventory** – Tracks stock levels and supports inventory monitoring and warehouse operations.

SETUP > OBJECT MANAGER

Inventory

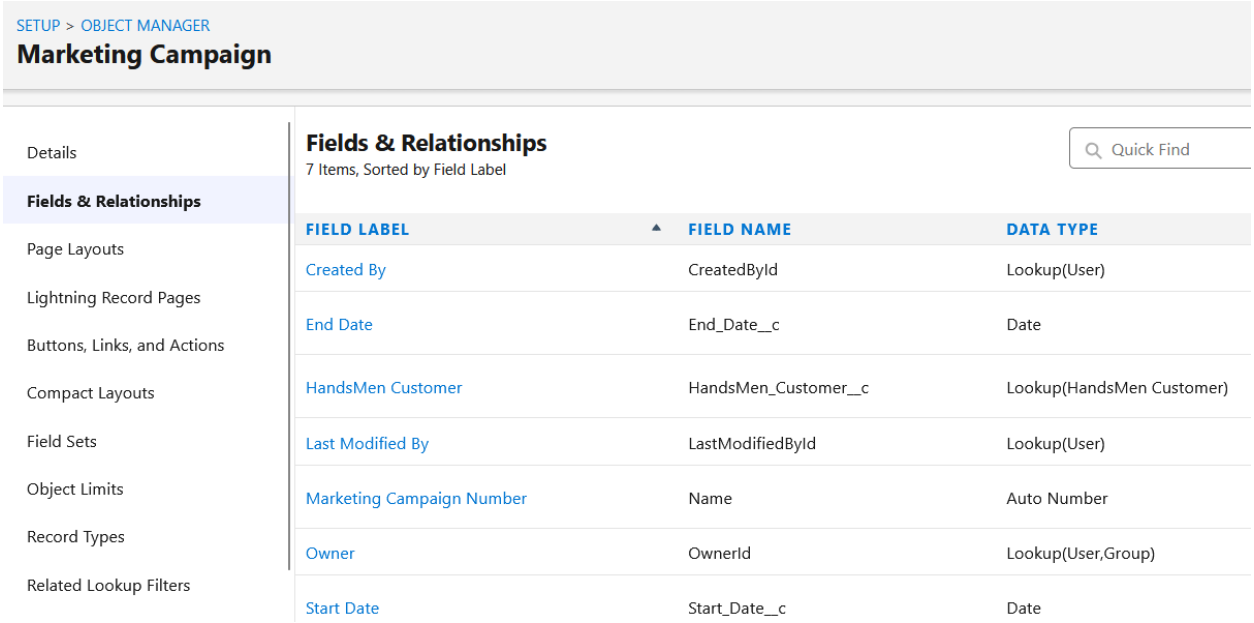
- Details
- **Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Fields & Relationships

7 Items, Sorted by Field Label

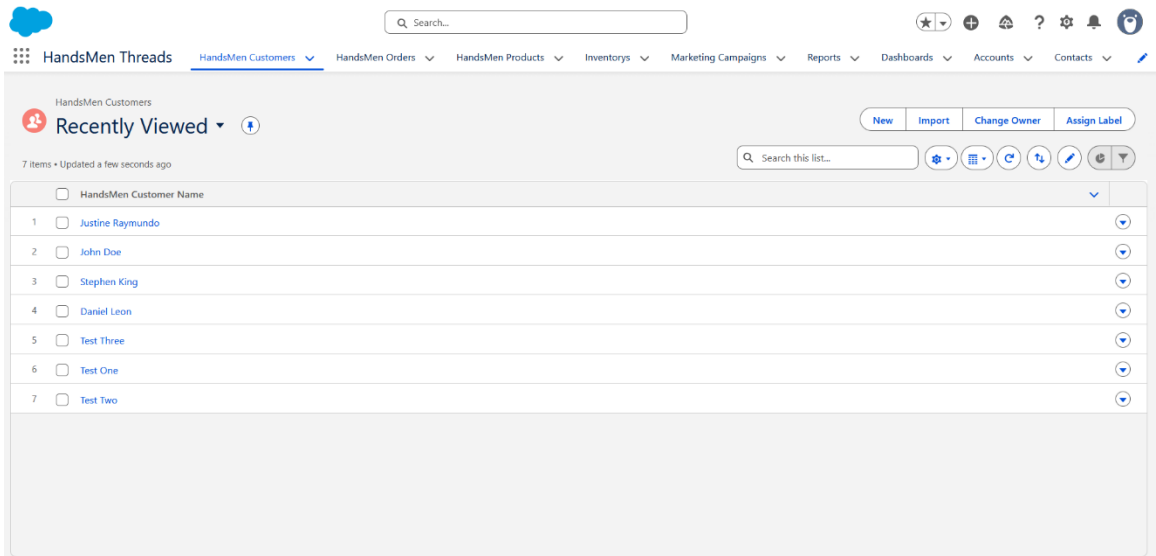
FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Inventory Number	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Product	Product__c	Master-Detail(HandsMen Product)
Stock Quantity	Stock_Quantity__c	Number(18, 0)
Stock Status	Stock_Status__c	Formula (Text)
Warehouse	Warehouse__c	Text(50)

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 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

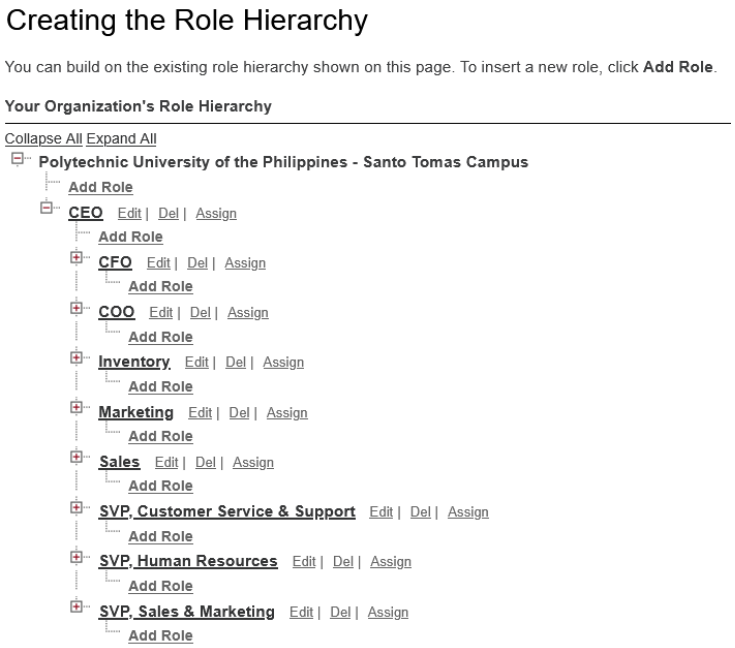
The number of stock quantity of product must not be less than or equal to zero.

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.



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

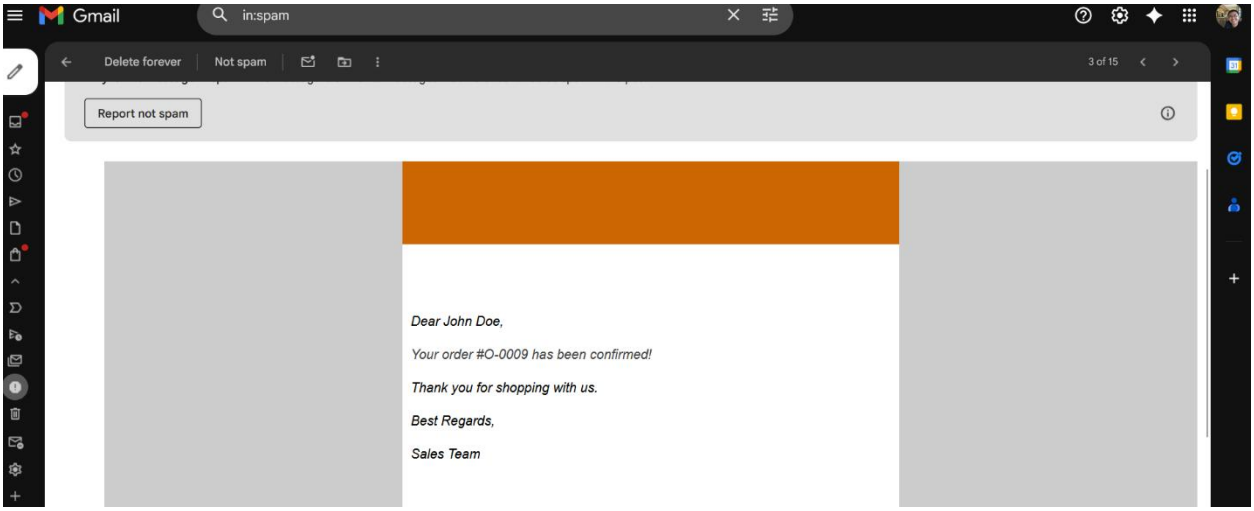
☐	Edit	Mikaelson, Kol	kmika	kmikaredmonkey@gmail.com	Inventory	☐	Platform 1
☐	Edit	Mikaelson, Niklaus	nmika	nmikabluezoo@gmail.com	Sales	✓	Platform 1
☐	Edit	Mikaelson, Richard	rmika	justineraymundocatto23@gmail.com	Marketing	✓	Platform 1
☐	Edit	Raymundo, Justine	jus	justineraymundo18897@agentforce.com		✓	System Administrator

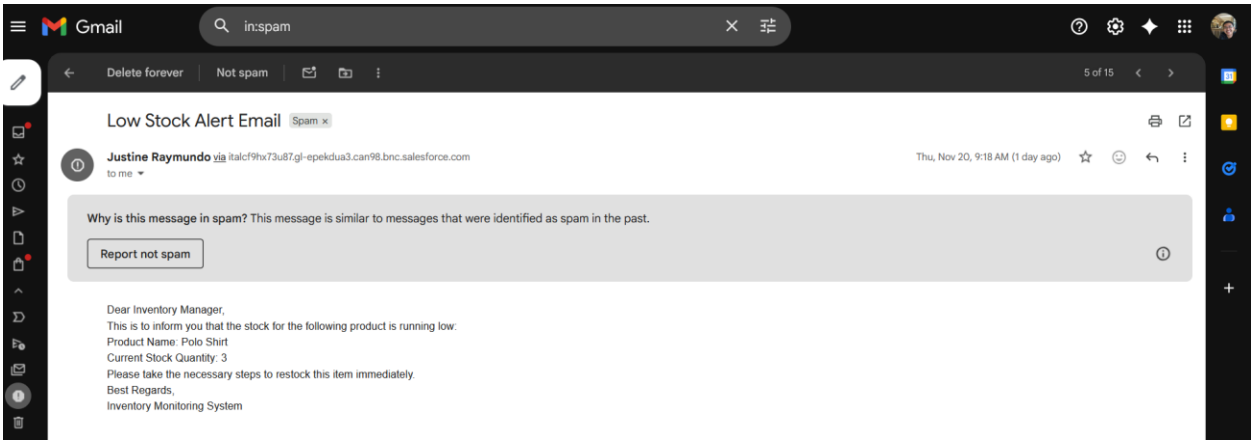
6. Email Templates and Email Alerts

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.

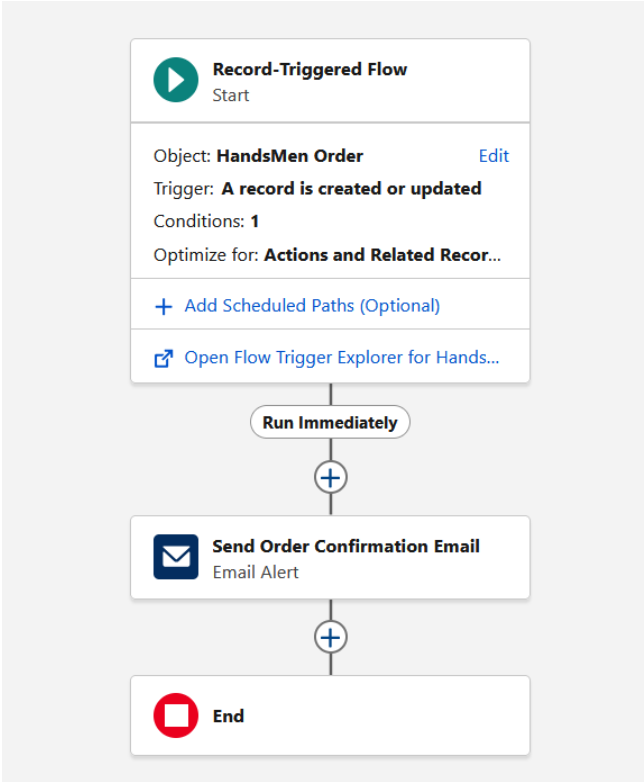
Email Alerts were then configured to leverage these templates within Flows and other automation processes, allowing the system to deliver seamless, automated messaging across various business situations.



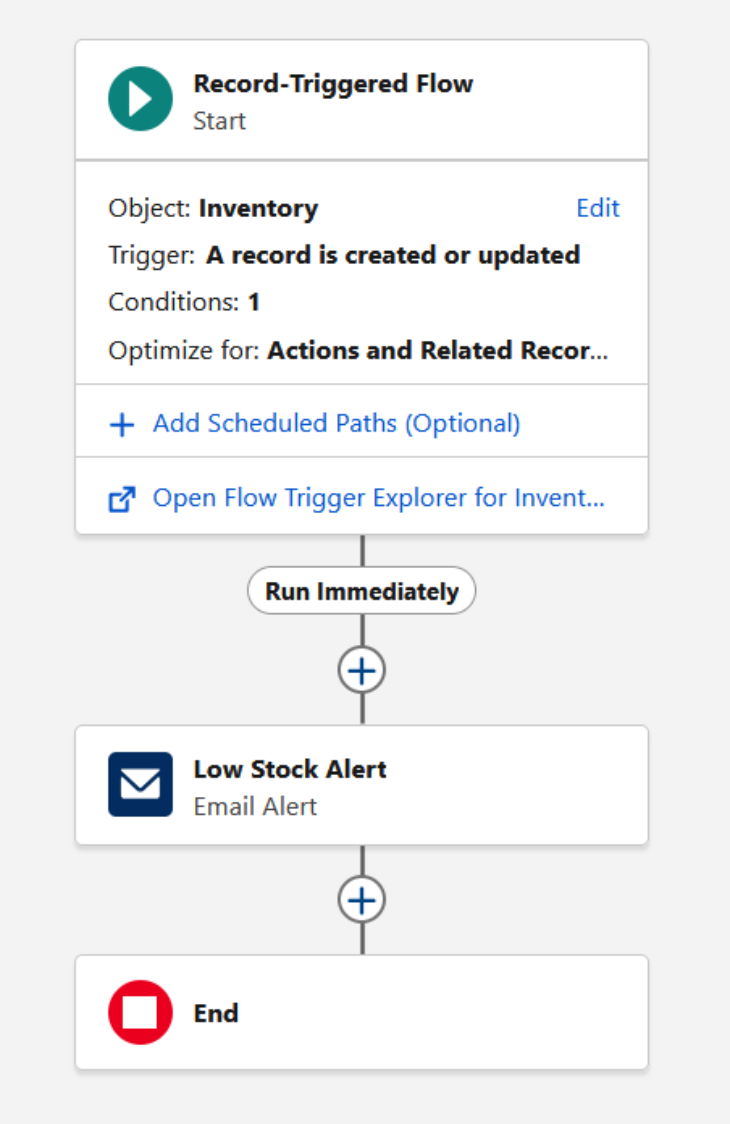


7. Flow Implementation

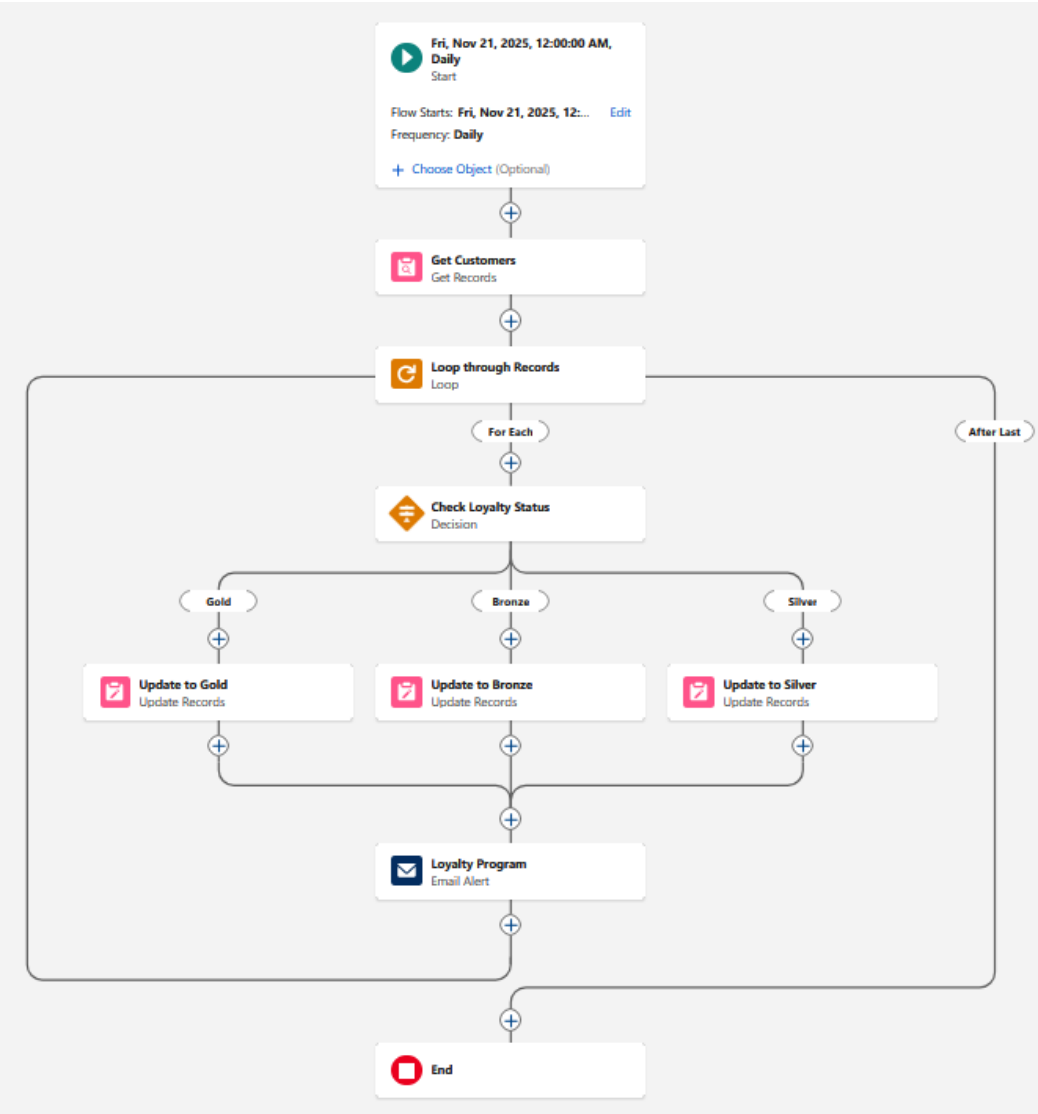
A. Order Confirmation Email (Record-Triggered) – A customer will receive an Order Confirmation Email whenever they have confirmed their order in HandsMen Threads.



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

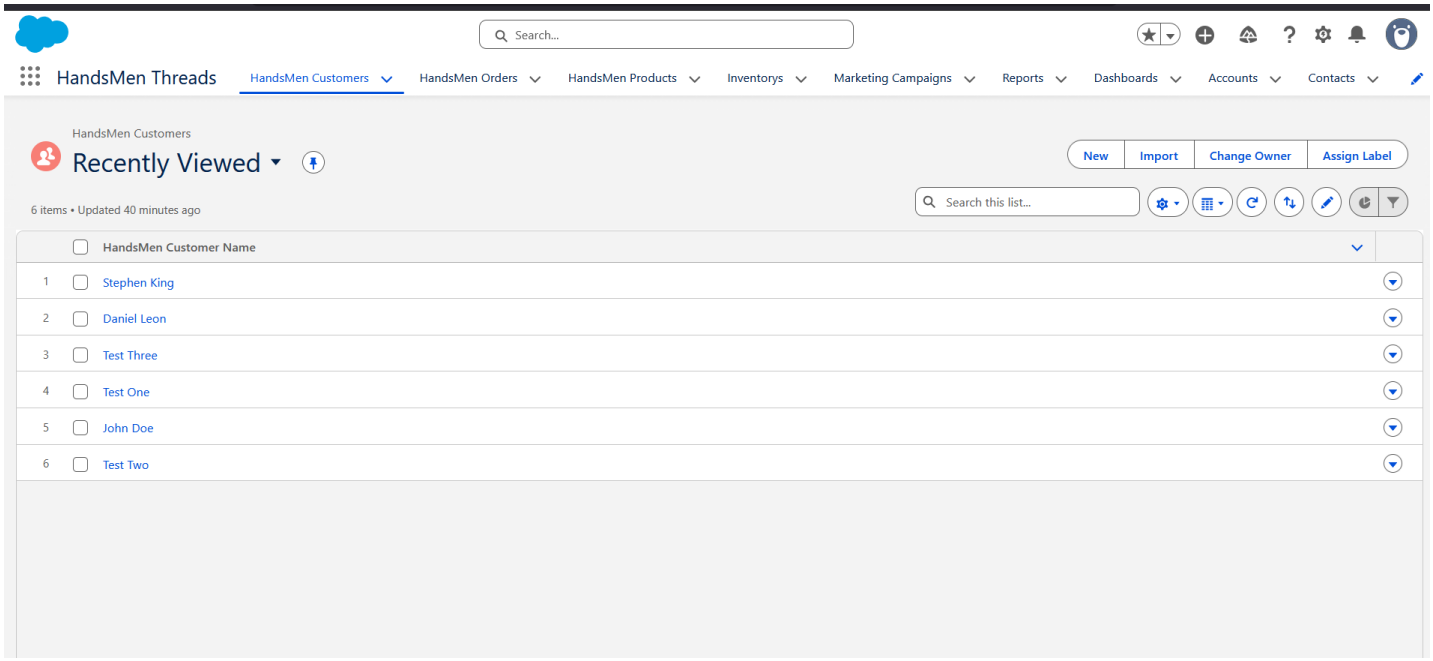


Image 1: HandsMen Threads Application

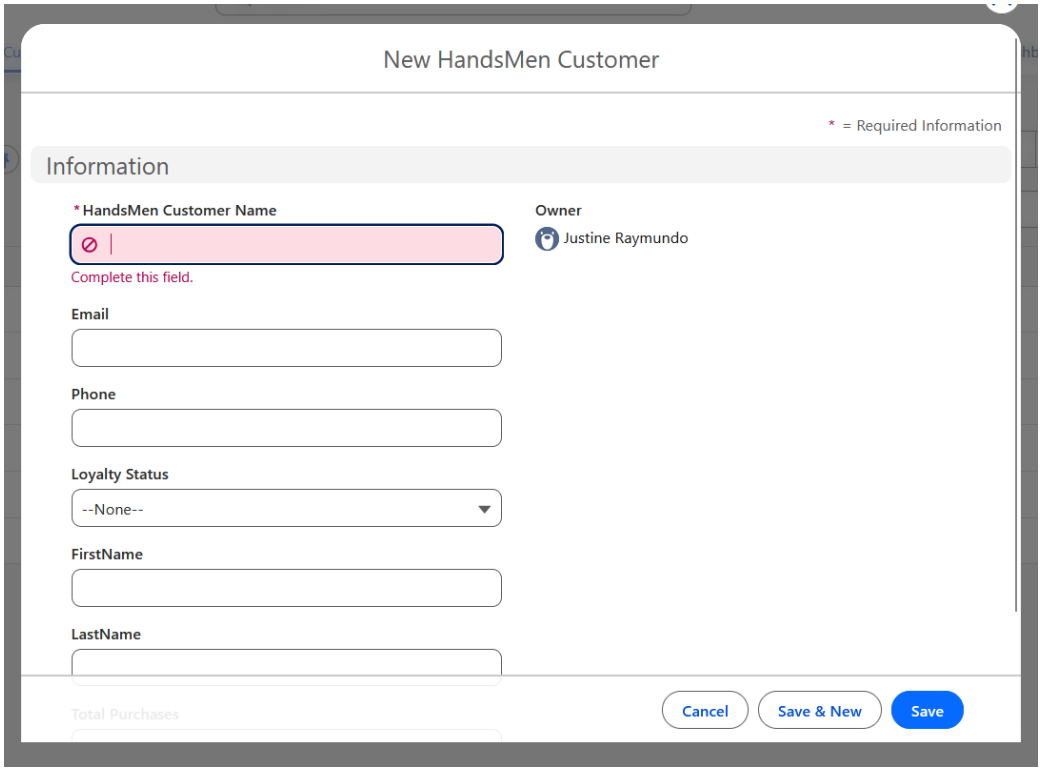


Image 2: HandsMen Customer Creation Form

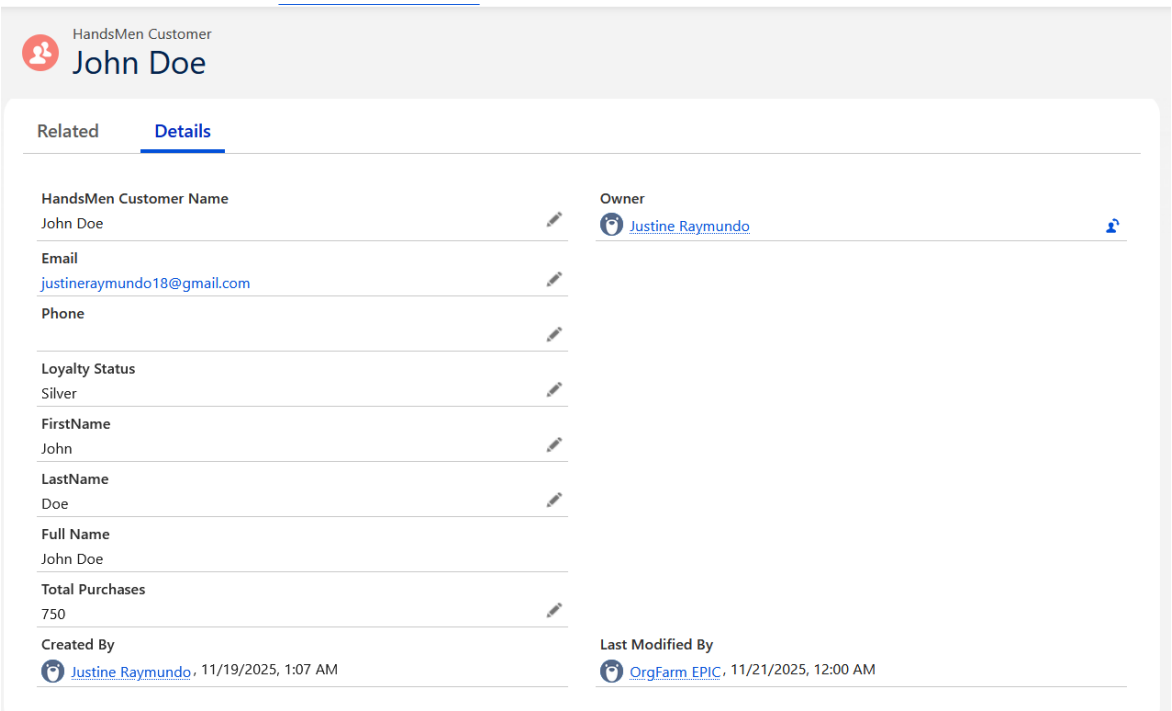


Image 3: Customer Detail Page

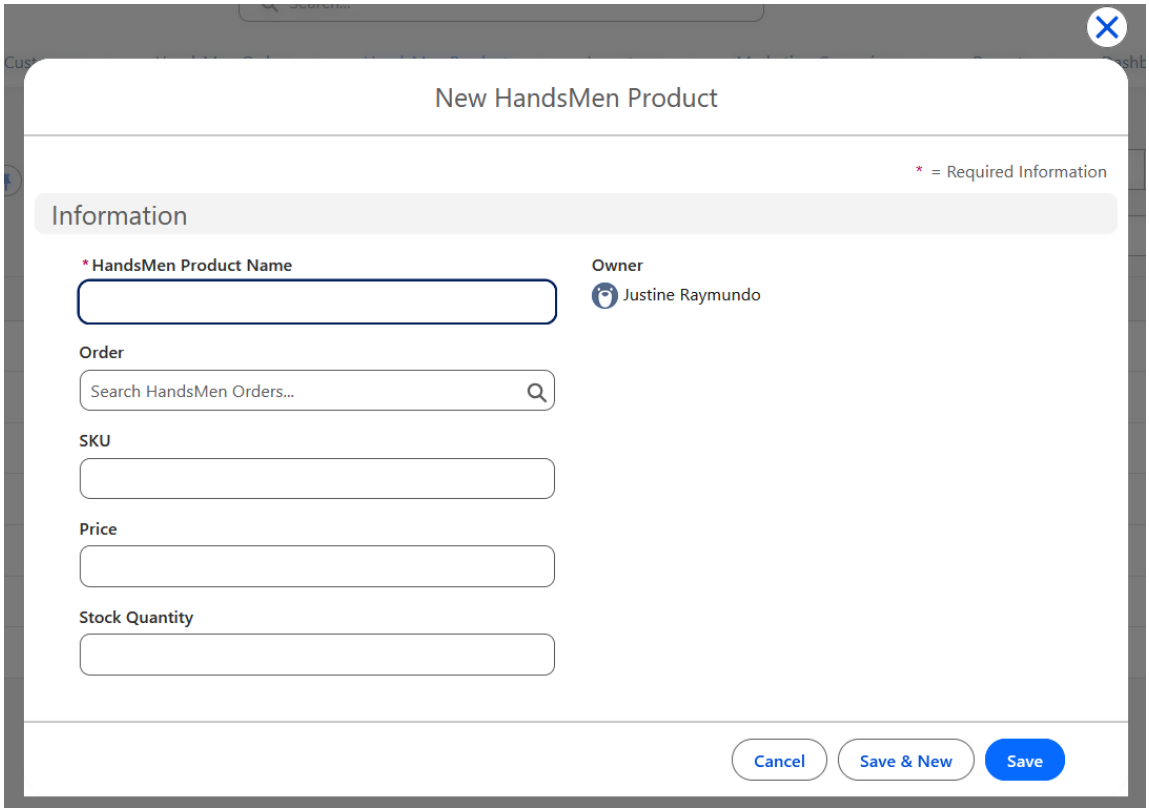


Image 4: HandsMen Product Creation Form

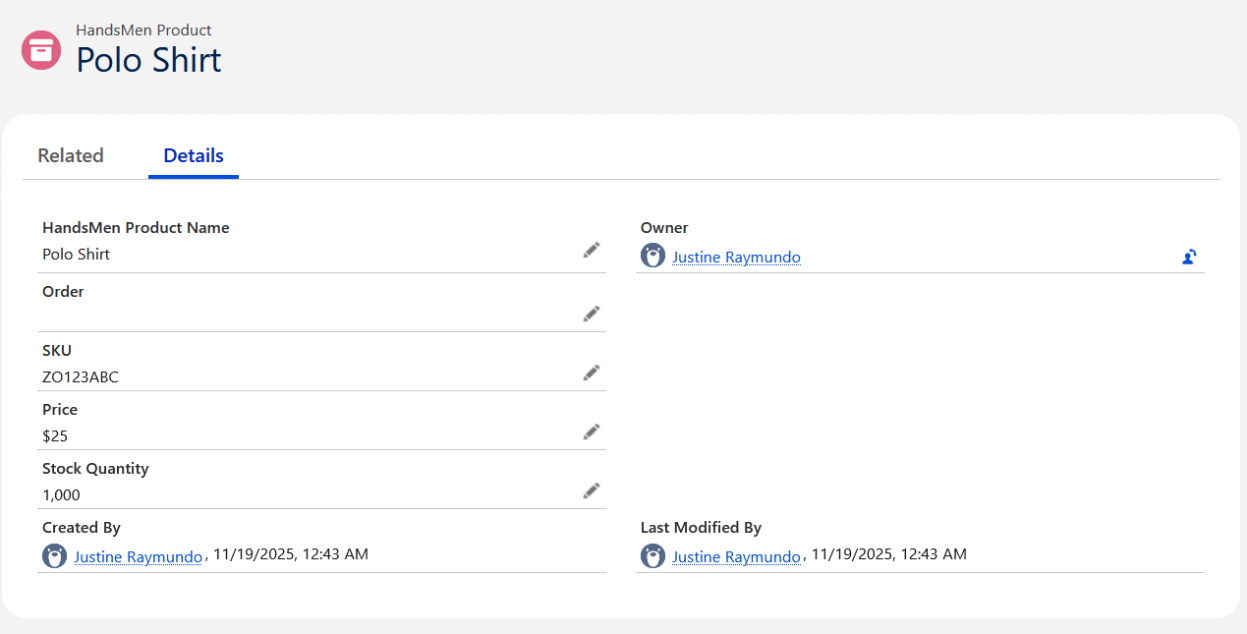


Image 5: Product Detail Page

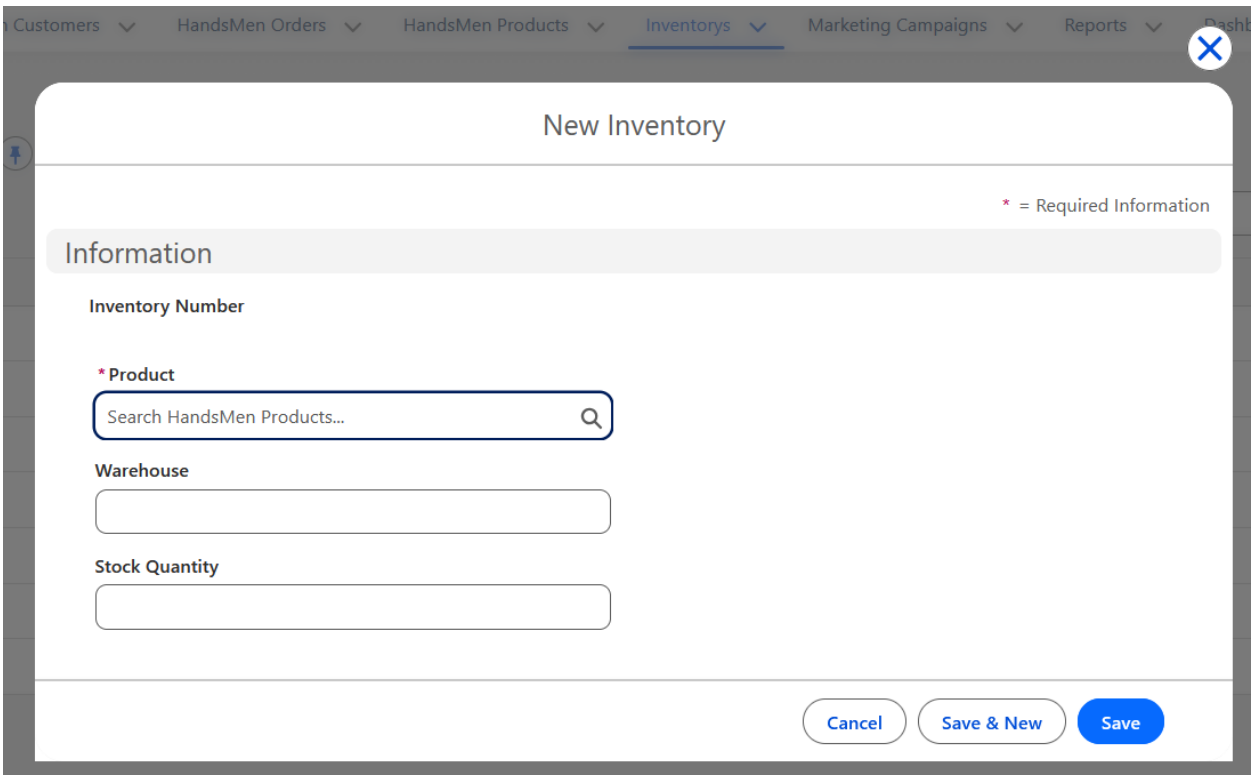


Image 6: HandsMen Inventory Creation Form

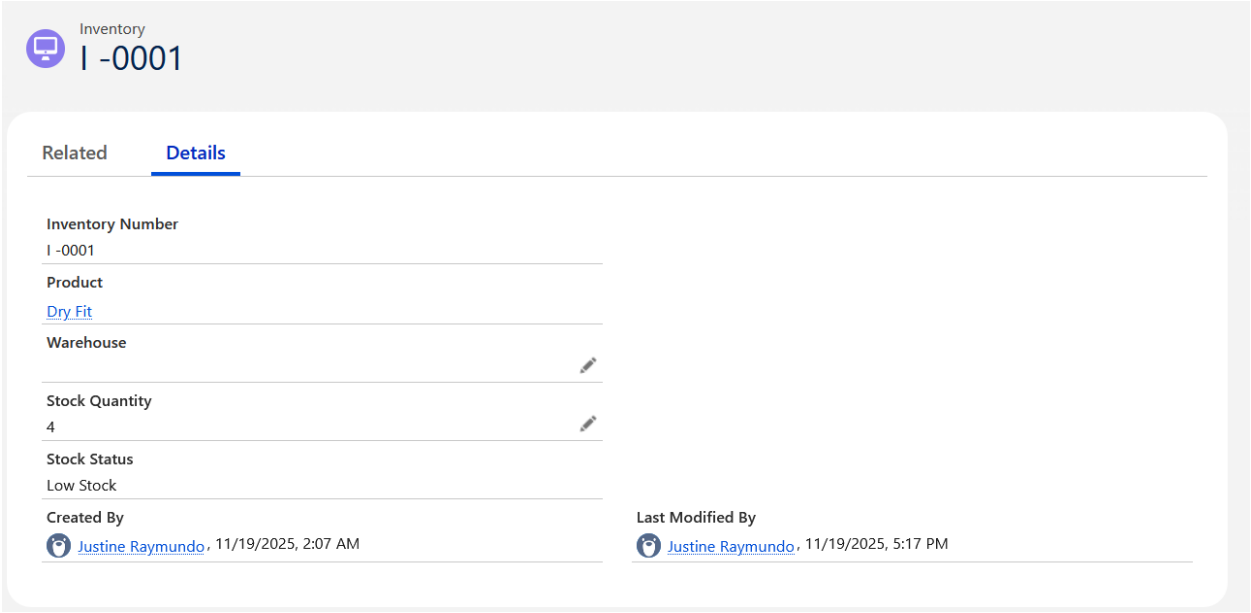


Image 7: Inventory Detail Page

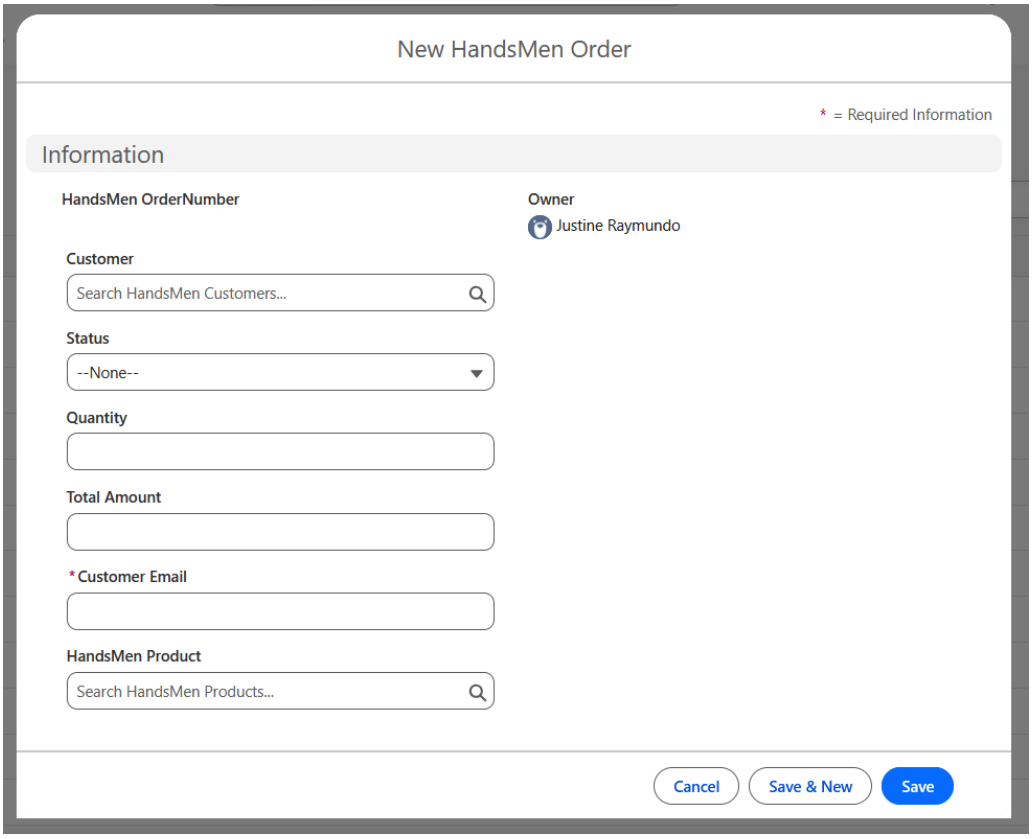


Image 8: HandsMen Order Creation Form

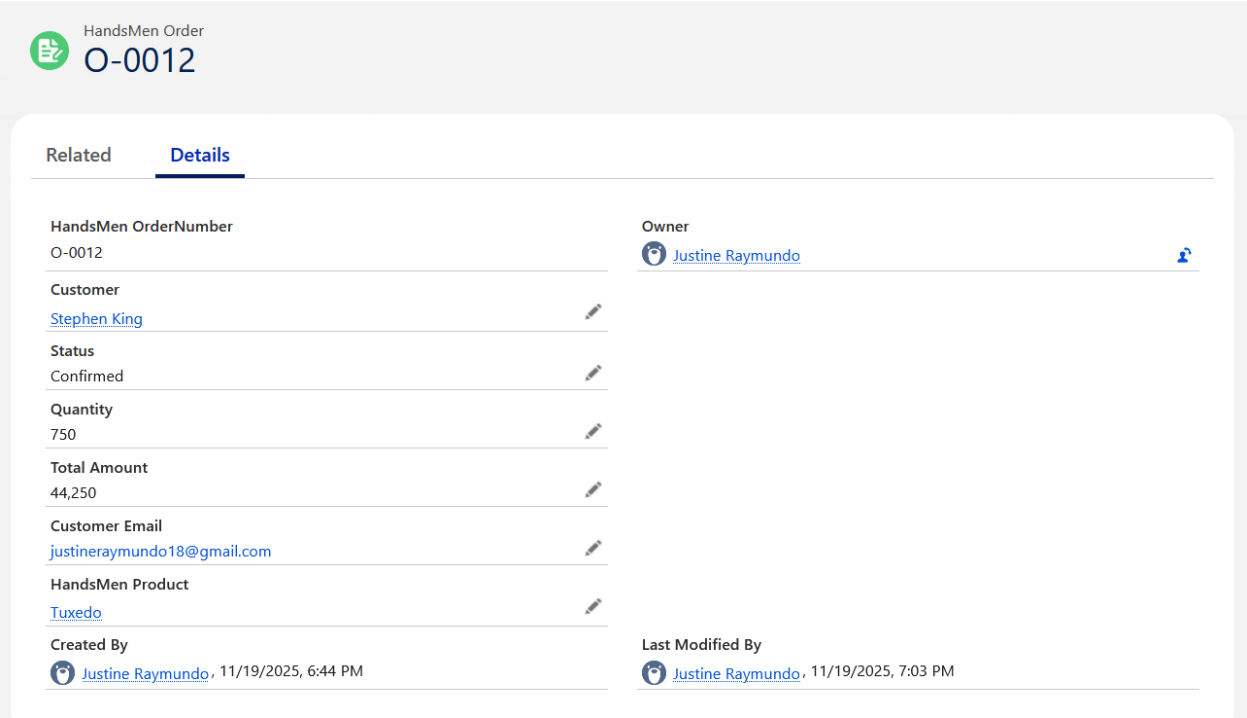


Image 9: Order Detail Page

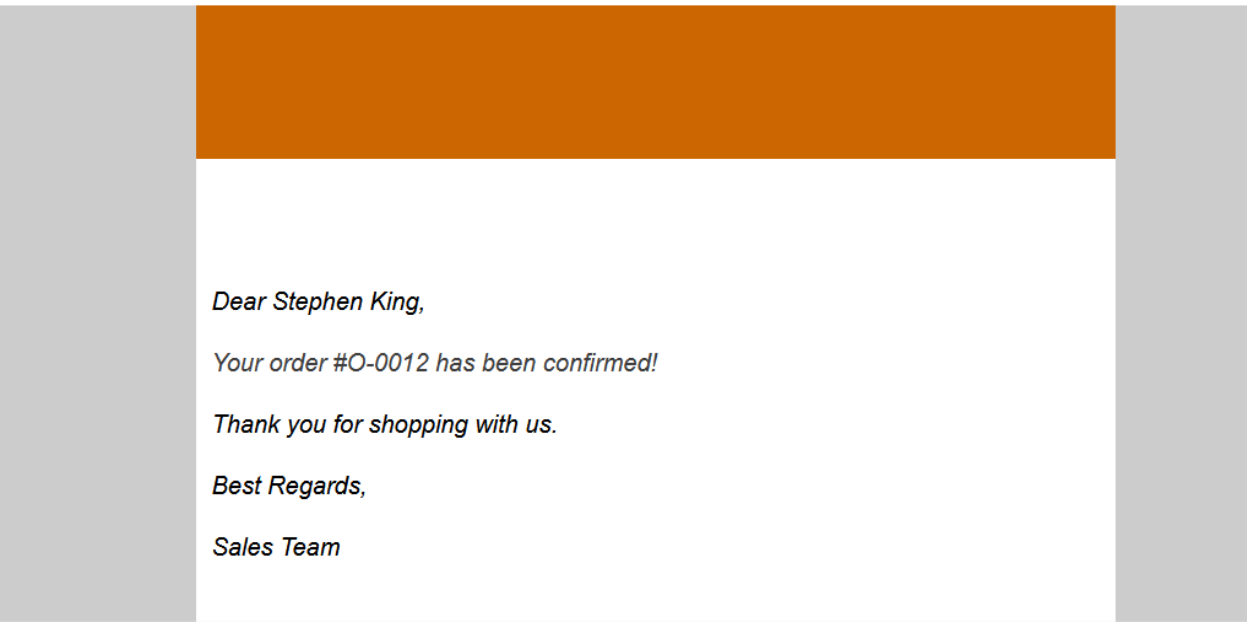


Image 10: Order Confirmation Email Received by the Customer

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.