

HandsMen Threads: Redefining Modern Elegance in Men's Fashion

ABSTRACT

This study presents the development of a tailored Salesforce CRM solution designed for **HandsMen Threads**, a distinguished brand specializing in premium men's fashion and custom tailoring. The system was built to enhance the company's operational workflow by integrating essential business functions—sales, inventory control, customer management, and marketing—into a single cohesive platform.

Five custom objects were created to structure business data more efficiently, while automation tools such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex were implemented to eliminate repetitive tasks and accelerate process execution. To ensure data integrity, validation rules and a role-based security model were added, safeguarding critical information and enforcing organizational standards.

By consolidating these capabilities within Salesforce, HandsMen Threads gains improved visibility over its operations, stronger customer engagement, and a more efficient way to manage inventory and communication. The solution establishes a scalable technological foundation that supports long-term growth and delivers a seamless, more personalized customer experience.

OBJECTIVES

- **Unified CRM Environment:** Build a centralized Salesforce system that organizes customer, order, inventory, and marketing information into one platform tailored for HandsMen Threads.
- **Automation:** Streamline essential business operations using Flows, Email Alerts, and Apex to minimize manual workload and increase efficiency.
- **Customer Engagement:** Enable personalized communication through automated order updates, loyalty notifications, and marketing campaign alerts.
- **Data Integrity:** Maintain accurate and trustworthy records with validation rules, secure access, and role-based permissions for sales, marketing, and inventory teams.
- **Scalability:** Provide a CRM framework capable of supporting future expansion and a growing customer base.
- **Inventory Control:** Strengthen monitoring with automated low-stock alerts and scheduled batch processes to keep stock levels accurate and up to date.

TECHNOLOGY DESCRIPTION

This project leverages **Salesforce**, a leading cloud-based Customer Relationship Management (CRM) platform, to create an integrated and efficient business solution for HandsMen Threads. As a

scalable cloud system, Salesforce enables the development of custom objects, automated processes, and secure data structures without requiring traditional hardware infrastructure.

Core tools utilized in this project include:

- **Record-Triggered & Scheduled Flows:** Automating repetitive tasks and ensuring timely updates.
- **Email Alerts:** Delivering real-time communication to customers and internal teams.
- **Validation Rules:** Enforcing data accuracy and consistency across records.
- **Reports & Dashboards:** Providing actionable insights into sales, inventory, and campaign performance.
- **Apex Programming:** Executing specialized functions such as batch inventory updates and complex record operations.

Salesforce's **role-based security model** ensures that sensitive information is protected by granting access only to authorized users within designated roles. With its cloud-hosted architecture, the system provides uninterrupted access across devices, allowing teams to manage operations anytime and anywhere.

Overall, the technologies and tools used in this system contribute to enhanced operational efficiency, improved data accuracy, and a more personalized experience for customers interacting with HandsMen Threads.

1. Developer Org Setup

Creating a developer org or playground in trailhead for salesforce capstone project

The screenshot shows the "Sign up for your Developer Edition" page. The background features a dark blue gradient with white text. On the left, there is a heading "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below it, a list of benefits includes: "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", and "✓ Integrate with anything using APIs". On the right, there is a form with fields for "First name" and "Last name", "Job title" and "Work email", "Company" and "Country/Region". A note below the company field states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure." At the bottom, there is a checkbox agreement to the "Main Services Agreement – Developer Services and Salesforce Program Agreement" and a link to the "Privacy Statement".

2. Creation of Custom Objects

Data Management - Objects 0% ^

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

3. Set the correct field on each custom objects

Data Management - Fields 0% ^

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

4. Creation of Validation rules for Emails, Amount, and more

Data Configuration 0% ^

Validation Rules

Create Remaining Validation Rules

Data security - Profiles 0% ^

Profile - Sales

Data Security - Roles 0% ^

Role - Sales

Create Roles

Data Security - Users

0% ^

User - Niklaus

User - Kol

Create Users

Data Security - Permission Set

0% ^

Permission set - Permission_Platform_1

6. Setting up the email template and alerts

Email Template

0% ^

Create an Order Confirmation Email Template

Create Remaining Email Templates

Create an Email Alert

7. Creation of flow for the proper function of email alerts

Flows

0% ^

Create Order Confirmation Email

Create Stock Alert Email (Record-Triggered)

Create a Scheduled Flow

8. the Creation of Apex triggers and class

Automation using Apex

0% ^

Create Apex Class

Batch Jobs

0% ^

Create Batch Apex

Created Competent within the System or
the **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**

Handsman Customer

The screenshot displays the HandsMen Threads application interface on a web browser. At the top, a navigation bar includes links for HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. Below the navigation is a search bar and a toolbar with buttons for New, Import, Change Owner, and Assign Label.

The main area shows a list of HandsMen Customers. Two items are listed: 'naki' and 'rin'. A tooltip indicates '2 items • Updated a few seconds ago'. Below the list is a large modal window titled 'Information'.

The 'Information' modal contains the following fields:

- * HandsMen Customer Name: An input field containing a red placeholder icon (empty state).
- Owner: Marius Jet Alyson Peñano (with a small profile icon).
- Email: An empty input field.
- Phone: An empty input field.
- Loyalty Status: A dropdown menu showing '--None--'.
- FirstName: An empty input field.
- LastName: An empty input field.
- Total Purchases: An empty input field.

At the bottom of the modal are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button.

Handsman Order

The screenshot displays the HandsMen Threads Salesforce Lightning interface. At the top, there is a navigation bar with various tabs: HandsMen Threads, HandsMen Customers, HandsMen Orders (selected), HandsMen Products, Inventories, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts.

The main area shows a "Recently Viewed" list under the "HandsMen Orders" tab. It lists four items, each with a checkbox and a link labeled "O-0001", "O-0002", "O-0003", and "O-0004".

A modal window titled "New HandsMen Order" is open in the foreground. It contains fields for "Information": "HandsMen Order Name" (with placeholder "Search HandsMen Products..."), "Owner" (set to Marius Jet Alyson Peñano), "HandsMen Product" (with placeholder "Search HandsMen Customers..."), "Status" (dropdown menu showing "--None--"), "Quantity" (text input field), "Total Amount" (text input field), and "Customer Email" (text input field). At the bottom of the modal are three buttons: "Cancel", "Save & New", and "Save".

Handsman Product

The screenshot displays two overlapping pages from a software application. The top page is a list of 'HandsMen Products' with a search bar and various filter and action buttons. It shows two items: 'T-shirt cloth' and 'hat'. The bottom page is a 'New HandsMen Product' form. It has a header with a back arrow and a title. A note indicates that fields marked with an asterisk (*) are required. The form contains four input fields: 'HandsMen Product Name' (with a placeholder 'Enter product name...'), 'SKU' (empty), 'Price' (empty), and 'Stock Quantity' (empty). To the right of the 'Name' field is an 'Owner' section showing 'Marius Jet Alyson Peñano'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

Recently Viewed

HandsMen Product Name

1 T-shirt cloth

2 hat

New HandsMen Product

* = Required Information

Information

HandsMen Product Name

Owner
Marius Jet Alyson Peñano

SKU

Price

Stock Quantity

Cancel Save & New Save