

# HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion Using Salesforce CRM

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## ABSTRACT

This project presents a custom Salesforce CRM solution designed for *HandsMen Threads*, a men's fashion brand focused on providing premium, sophisticated products. The system automates key business operations including customer management, order processing, product inventory monitoring, loyalty program classification, and automated email notifications. Using Salesforce objects, flows, validation rules, and email alerts, the project delivers an intelligent, scalable, and efficient CRM platform. The outcome is a fully functional system that improves business workflow, supports decision-making, and enhances the overall customer experience.

## OBJECTIVE

The primary objective of this capstone is to build a functional Salesforce CRM system that supports daily business operations for a clothing and fashion retail brand. Specifically, the objectives are:

1. To create custom Salesforce objects for customers, orders, products, inventory, and loyalty records.
2. To automate business processes using Flow Builder and Apex triggers.
3. To implement email alerts for order confirmations, low stock notifications, and loyalty updates.

4. To ensure data accuracy through validation rules and relationships.
5. To design a CRM model that mirrors real-world retail business operations.

## TECHNOLOGY DESCRIPTION

This project was developed using the following Salesforce tools and technologies:

### **Salesforce Platform**

- **Salesforce Developer Edition Org** used to implement all custom configurations.
- **Object Manager** for custom objects, fields, and relationships.
- **Lightning App Builder** for grouping all objects under a custom app.
- **Flow Builder** for no-code business automation.
- **Email Alerts & Email Templates** for system-triggered notifications.
- **Validation Rules** for maintaining clean and accurate data.
- **Apex Trigger (optional)** for automatic calculation of order totals.

### **Other Applications**

- **Gmail** – for receiving automated Salesforce alerts.
- **Zoom**– used for recording the project demo video.

# DETAILED EXECUTION OF PROJECT PHASES

## Phase 1 — Salesforce Org Setup

- Created a new Salesforce Developer Edition org.
- Configured user profile, password, and verification email.
- Created a custom Lightning App: **HandsMen Threads**.

## Phase 2 — Custom Object Creation

Created the following objects:

1. **HandsMen Customer**
2. **HandsMen Product**
3. **Inventory**
4. **HandsMen Order**
5. **Marketing Campaign** (optional)
6. **Loyalty Record**

Each object includes fields such as:

- First Name, Last Name, Email, Phone
- SKU, Price, Stock Quantity
- Order Date, Quantity Ordered
- Loyalty Status (Gold, Silver, Bronze)

## Phase 3 — Fields, Formula Fields, Validation Rules

### Fields & Relationships

- Lookup relationships created between customers, orders, products, and loyalty records.
- Formula fields created:
  - **Full Name** = First Name + Last Name
  - **Stock Status** = “Available” or “Low Stock”

### Validation Rules

- Total Amount must be greater than 0.
- Email format must be valid.
- Stock Quantity must not be negative.

## Phase 4 — Automations Using Flows

### ◆ Order Confirmation Flow

Triggers when order status changes from “Pending” → “Confirmed” and sends email.

### ◆ Low Stock Alert Flow

Checks inventory and sends alert if stock goes below threshold (ex. < 10).

### ◆ Loyalty Program Scheduled Flow

Runs daily/weekly to update loyalty tier based on total purchase amount.

## Phase 5 — Email Templates & Alerts

- Created 3 email templates:

- Order Confirmation
  - Low Stock Alert
  - Loyalty Tier Update (Gold/Silver/Bronze)
- Set up Organizational-Wide Email Address
- Configured Email Alerts used in Flows

## Phase 6 — Apex Trigger (Optional)

A simple Apex trigger was implemented to automatically compute Total Order Amount:

```
trigger CalculateOrderTotal on HandsMen_Order__c (before
insert, before update) {

    for (HandsMen_Order__c order : Trigger.new) {

        order.Total_Amount__c = order.Quantity__c *
order.Unit_Price__c;

    }

}
```

## Phase 7 — System Testing

### Test Cases:

1. Creating an order and changing status triggers confirmation email
2. Reducing stock triggers low stock alert
3. High purchases update loyalty tier

# PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

## Real Scenario:

A customer named *Daniel Cruz* purchases a blazer from HandsMen Threads.

## System Response:

1. The order is created and marked **Pending**.
2. Staff updates the order to **Confirmed**.  
→ Customer instantly receives an order confirmation email.
3. Inventory updates:
  - Stock drops from 10 to 2.  
→ System automatically sends **Low Stock Alert** to store manager.
4. Daniel accumulates ₱20,000 in purchases.  
→ Scheduled loyalty flow upgrades him to **Gold Member** and sends him a Gold Reward Email.

## Result

The system automates:

- Order processing
- Inventory updates
- Loyalty program
- Email notifications

Just like a real clothing retail chain (e.g., H&M, Uniqlo).

# SCREENSHOTS

The screenshot displays the Skill Wallet web application interface. The browser's address bar shows the URL: <https://philippines.myskillwallet.ai/dashboard/skillwallet/module/salesforce-developer-6788e9959d8d1ce2e912698c/projects/67aedf2557ba50db2fc5668b/handsmen-threads-elevating-the-art...>. The left sidebar contains navigation links: Dashboard, Skill Bank, Skill Wallet, Skill Card, and Skill Credits. The main content area is titled 'HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion' and includes tabs for Overview, Workspace, and Kanban. A blue banner prompts the user to 'Add Demo and GitHub links!'. Below this, the 'Use Case' section describes a Salesforce project for HandsMen Threads, focusing on data management and customer relations. The 'Project Progress' section on the right shows a 0% progress bar and buttons for adding demo and GitHub links. The 'Use Case' details include a complexity of Medium, a duration of 30 minutes, and 1 story. The 'User Story' section lists three items: Automated Order Confirmations, Dynamic Loyalty Program, and Proactive Stock Alerts.

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

**Add Demo and GitHub links!**  
Please update the demo and GitHub links so that your mentor can review and evaluate your project.

**Use Case:**

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.

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. Automated Order Confirmations: Post-order confirmation, customers will receive an email update, fostering engagement and strengthening customer relations.
2. Dynamic Loyalty Program: Customer loyalty statuses will be updated based on purchase history, enabling personalized rewards and promoting repeat business.
3. Proactive Stock Alerts: When stock levels drop below five units, automatic emails will notify the warehouse

**Project Progress** 0%

[Add Demo Link](#) [Add Github Link](#)

**Use Case**

Complexity: Medium Duration: 30m Progress: 0% Stories: 1

**User Story**

Salesforce Credentials Setup

Data Management - Objects

Data Management - Tabs

HandsMen Customer

john

Related Details

HandsMen Customer Name  
john

Email  
angel.ruguin17@gmail.com

Phone

Loyalty Status  
Bronze

FirstName  
john

LastName  
m

FullName  
john m

Total Purchases  
500

Created By  
angel.jasmin 11/28/2025, 12:25 AM

Owner  
angel.jasmin

Last Modified By  
angel.jasmin 11/28/2025, 1:56 AM

New Contact Edit New Opportunity

OrderTotalTrigger.apxc StockDeductionTrigger.apxc InventoryBatchJob.apxc

Code Coverage: None API Version: 65

```
1 global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3 global Database.QueryLocator start(Database.BatchableContext BC) {
4
5 return Database.getQueryLocator(
6
7 'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9 );
10
11 }
12
13 global void execute(Database.BatchableContext BC, List<SObject> records) {
14
15 List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
16
17 // Cast SObject list to Product__c list
18
19 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
angel.jasmin	Unknown	/services/data/v65.0/tooling/executeA...	11/28/2025, 6:21:05 PM	Success	Unread	2.88 KB
angel.jasmin	Browser	/aura	11/28/2025, 6:17:57 PM	Success	Unread	13.68 KB
angel.jasmin	Unknown	common.api.soap.DirectSoap	11/28/2025, 6:17:57 PM	Success	Unread	515 bytes
angel.jasmin	Browser	/aura	11/28/2025, 6:16:52 PM	Success	Unread	8.31 KB
angel.jasmin	Unknown	common.api.soap.DirectSoap	11/28/2025, 6:16:52 PM	Success	Unread	520 bytes
angel.jasmin	Browser	/aura	11/28/2025, 6:16:15 PM	Success	Unread	1.44 KB

Filter Click here to filter the log list



philippines.m x john | Hands x Flows | Sales x loyalty progr x Developer Co x loyalty progr x T-0001 | Inve x HandsMen.T x Your Order h x

https://orgfarm-4ca322f597-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=301gK00000ULUg9QAH

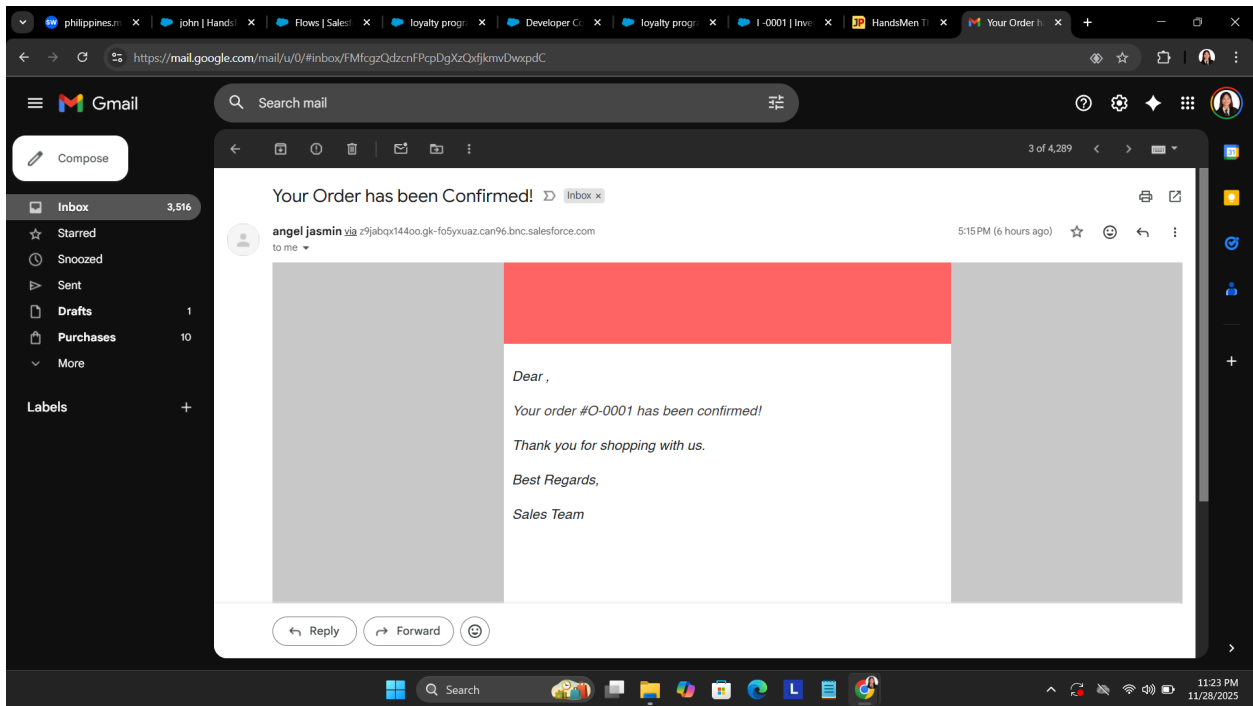
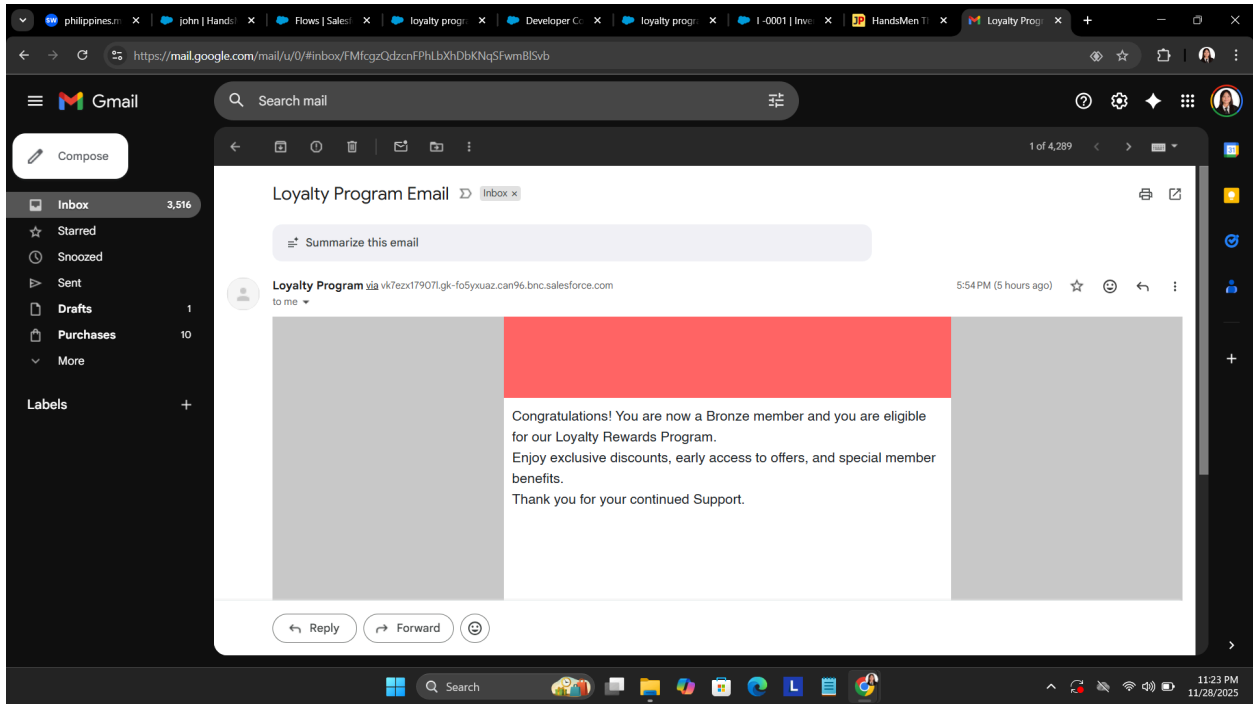
Flow Builder | loyalty program - V1

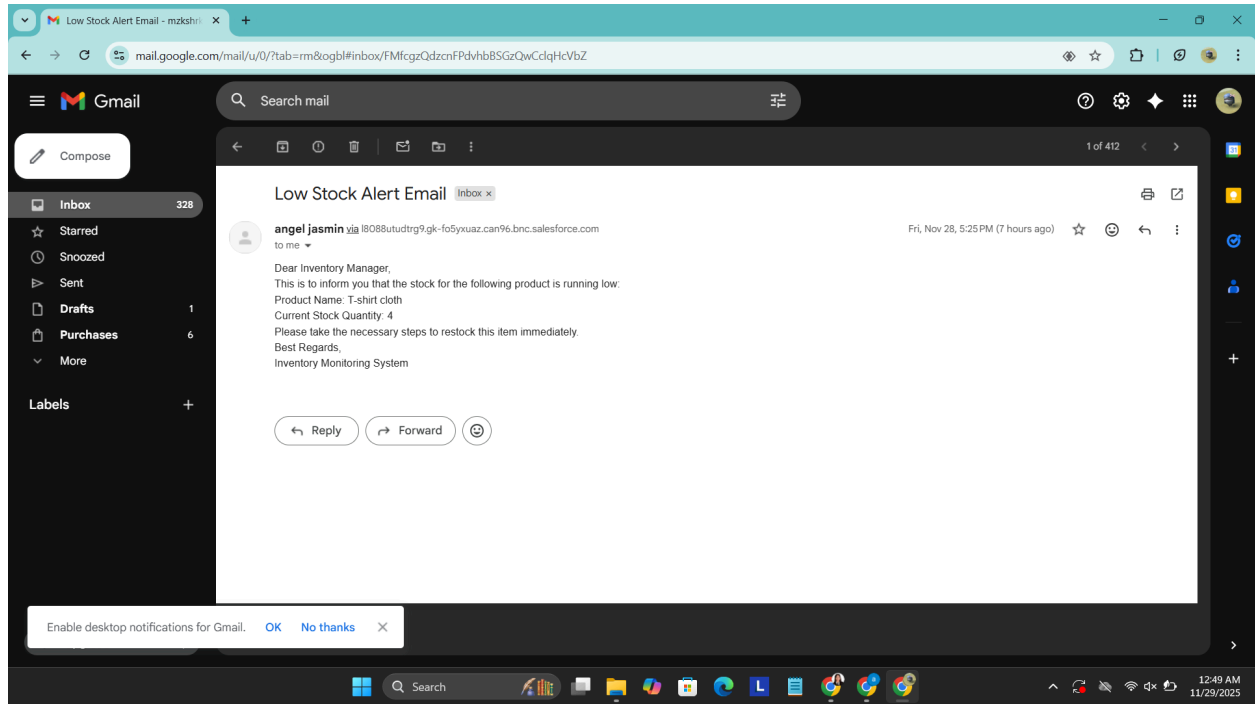
Auto-Layout

Last saved on 11/28/2025, 05:41 PM Active Run Debug Save As New Version Save Deactivate

```
graph TD; Start([Start]) --> GetCustomers[get customers]; GetCustomers --> Loop[loop through records]; Loop --> ForEach[For Each]; ForEach --> LoyaltyStatusCheck[loyalty status check]; LoyaltyStatusCheck --> AfterLast[After Last]; AfterLast --> Loop;
```

11:20 PM 11/28/2025





# CONCLUSIONS

The Salesforce CRM project for HandsMen Threads demonstrates how automation significantly enhances retail operations. By implementing flows, validation rules, and email alerts, the system reduces manual workload, improves accuracy, and strengthens customer engagement. The project successfully mirrors real-world business processes in the fashion retail industry and provides a scalable, efficient solution that can be adapted to any small or medium-sized retail business.