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

In partial fulfillment of the requirements for the subject MNSYSIT

Submitted by:

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Submitted to:

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Trailhead Virtual Internship Program

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Abstract

The goal of the HandsMen Threads Salesforce implementation project is to automate and modernize a men's fashion company's business processes. The goal of this project is to create a complete Salesforce system that streamlines workflows for inventory management, order tracking, customer management, and communication. HandsMen Threads improve efficiency, data accuracy, and customer engagement by integrating automation tools like Flows, Apex Triggers, Validation Rules, and Batch Jobs. The project exhibits real-world business use case-aligned Salesforce development, configuration, and customization expertise.

Introduction

HandsMen Threads is a high-end men fashion firm which deals with elegant attire and accessories. In an effort to reduce its operations and enhance its customer relationship management strategy, the company has chosen Salesforce as its centralized system. This capstone project aims at developing and designing a complete Salesforce application that helps in supporting day-to-day business operations- including order management, customer loyalty, inventory management, and automated notification.

The essential Salesforce components that are brought out in this project include: declarative tools, automation flows, Apex programming, and system deployment. It shows how Salesforce may be deployed to change manual operations into effective digital processes achieved through business expansion and customer satisfaction.

Objectives

To resolve the specified challenges successfully, it was essential to establish the objectives and deliverables of the Salesforce implementation. The goals are the roadmap that will direct in the development, testing, and implementation of HandsMen Threads CRM solution. All these objectives would help to increase the level of operational efficiency, customer satisfaction, and create a scalable system to serve the business in the future.

1. To model and create a unique Salesforce architecture in accordance with the business model of HandsMen Threads.
2. Automate the major processes in the business with Flows, Validation Rules, and Apex triggers.
3. To adopt an effective order management system and inventory tracking system.
4. To develop customer communication automation by email templates and alerts.
5. To achieve data security, accuracy, and performance by testing and deploying best practices.

Scope and Limitations

Scope:

The project will undertake the entire Salesforce implementation framework of HandsMen Threads, such as designing the system, customizing it, automating it and implementing it. It pays attention to automating order processing, inventory tracking, and customer interaction by email notifications and validation conditions. This system guarantees the integrity of data, automation of workflow, and effective management of business processes with the use of Salesforce applications such as Flows, Apex, and Batch Job.

Limitations:

The project does not entail the third-party system integrations, i.e. payment gateways or ERP systems. Mobile application extension and customer portal are suggested to be enhanced in the future but did not comprise the scope of the current project. Also, despite the automation of key workflows, real-time analytics and AI-driven recommendations were not included because of the lack of time and resources.

System Overview

The Salesforce solution for HandsMen Threads consists of several interconnected components:

- **Custom Objects:** HandsMen Customer, HandsMen Order, Inventory, Product.
- **Automation Tools:** Record-Triggered Flows, Scheduled Flows, Validation Rules, and Apex Triggers.
- **Batch Processing:** Apex Batch Job for daily inventory synchronization.
- **Email Templates & Alerts:** Automated order confirmations, stock alerts, and loyalty program updates.
- **Profiles, Roles & Permission Sets:** Ensure proper access control and secure data handling.

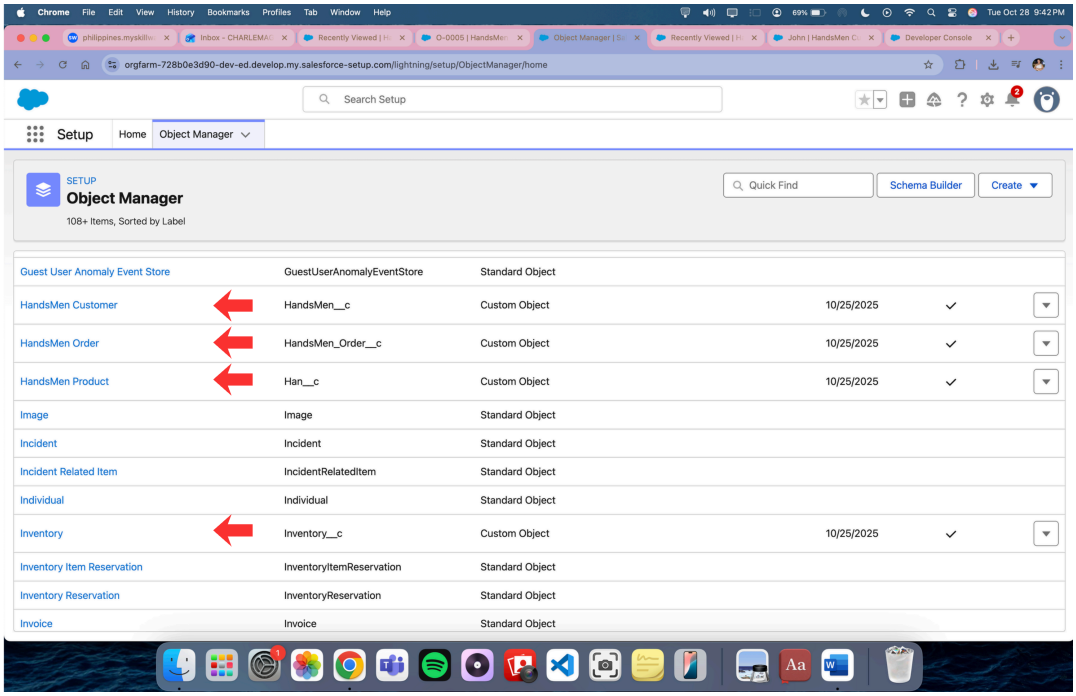
Project Phases

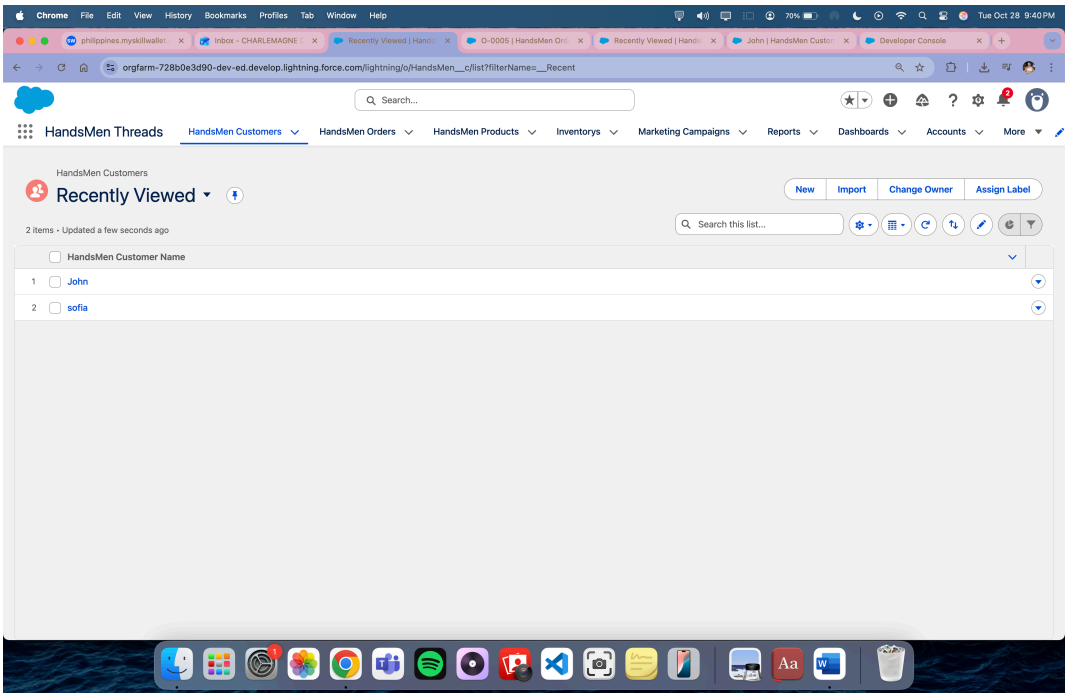
Phase 1: Architecture & Planning

- Defined objects, fields, and relationships between **HandsMen Customer**, **HandsMen Order**, and **Inventory**.
- Established formula fields for calculating totals and loyalty points.
- Designed validation rules to ensure data accuracy.
- Created automation workflows and Apex triggers business logic.
- Designed email templates for notifications and customer communication.

Phase 2: Development

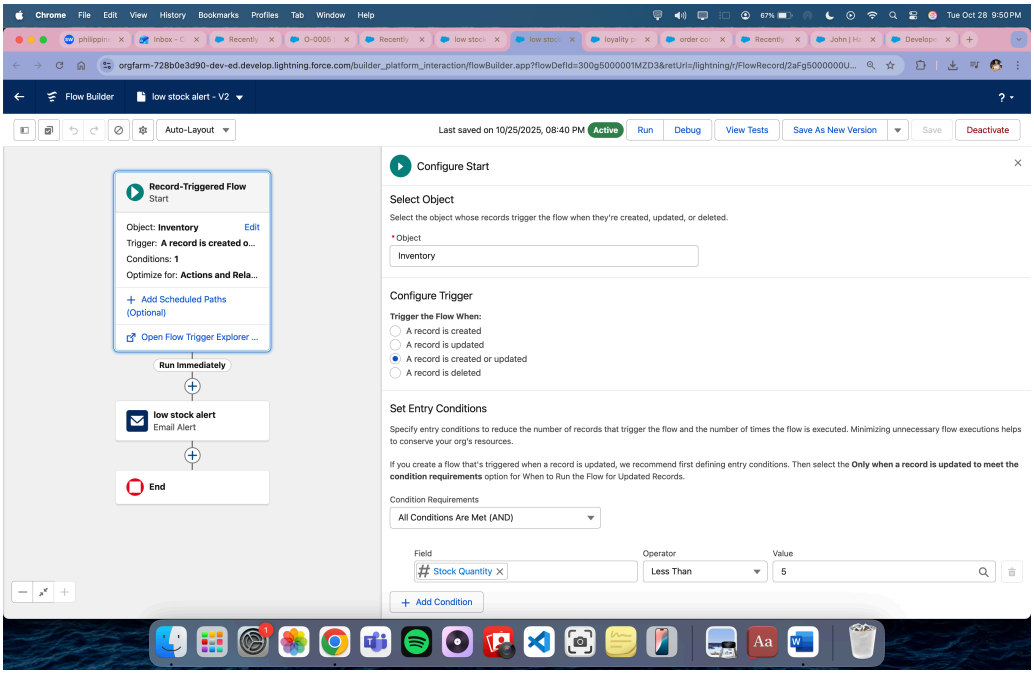
- Created custom objects and fields.



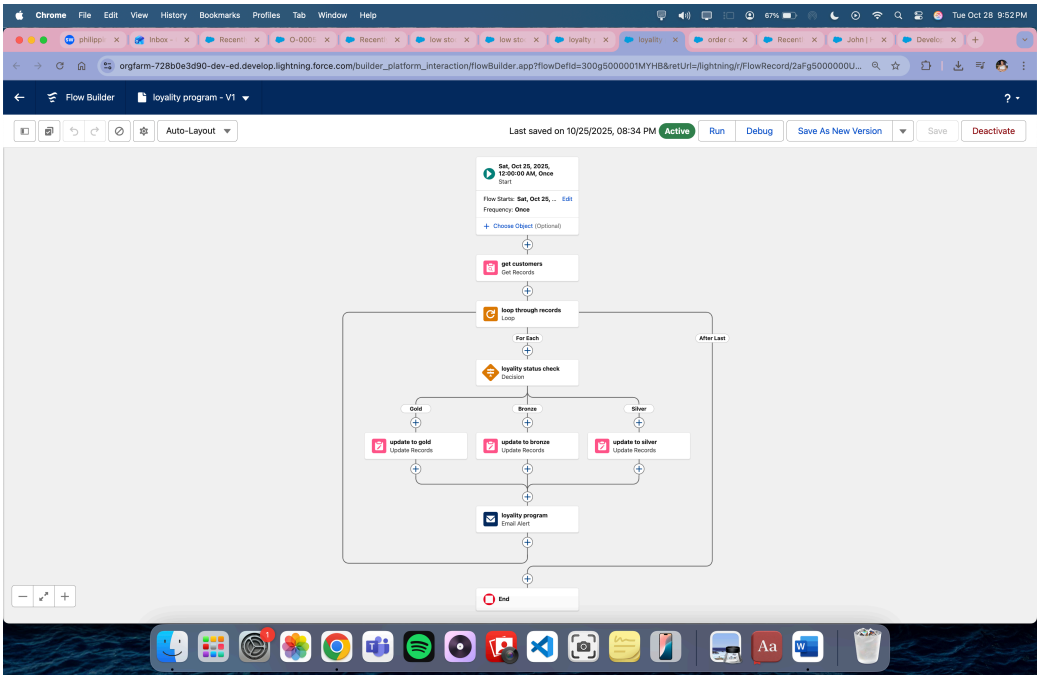


- Implemented automation via Flows, Process Builders, and Apex triggers.

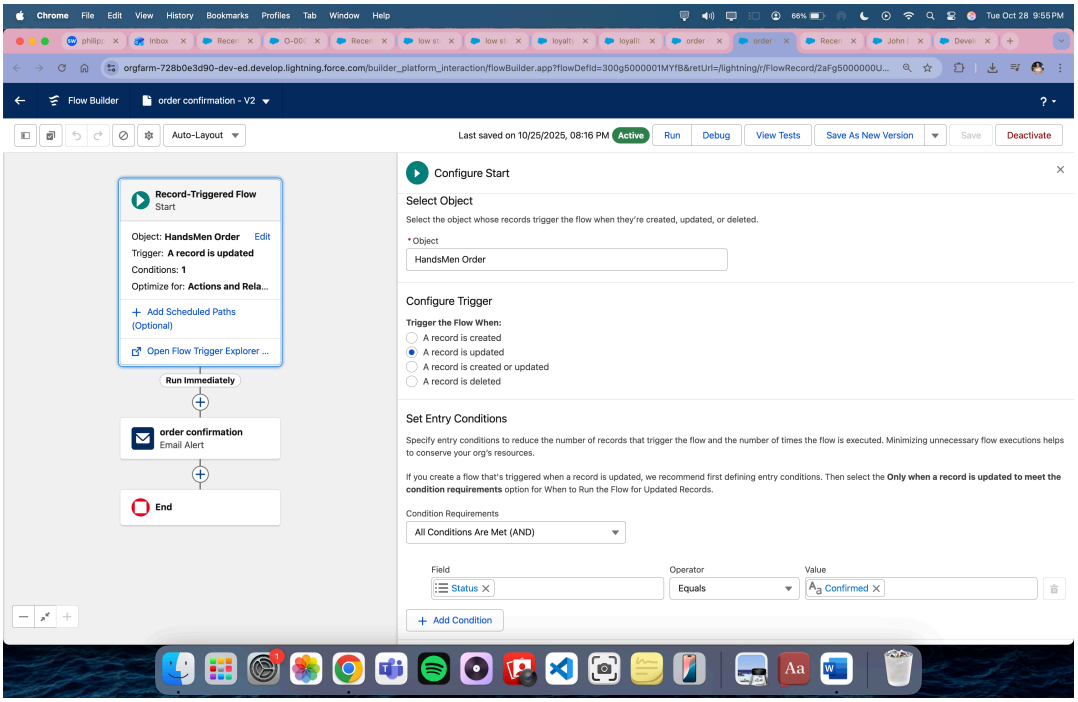
Low Stock Flow



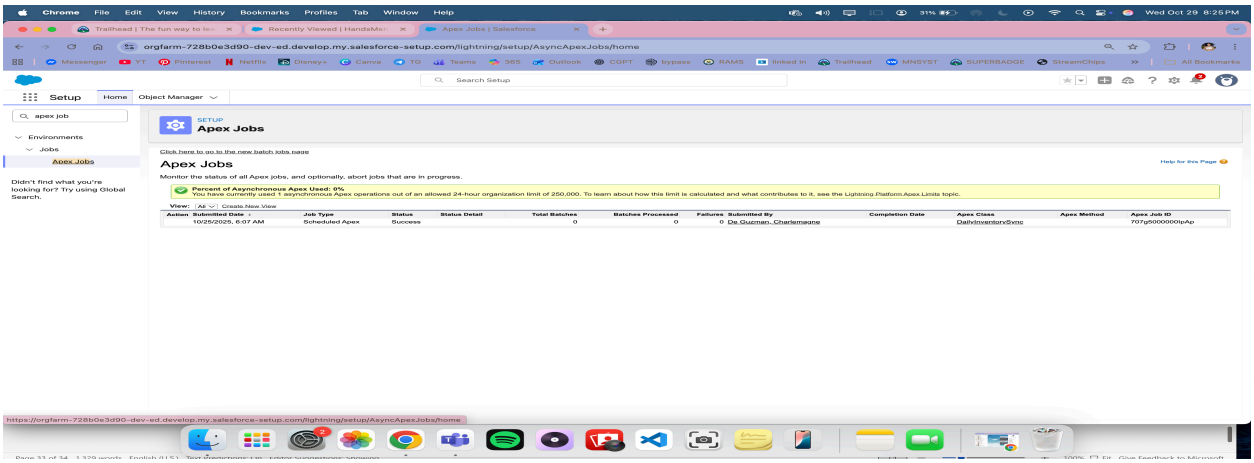
Loyalty Program Flow



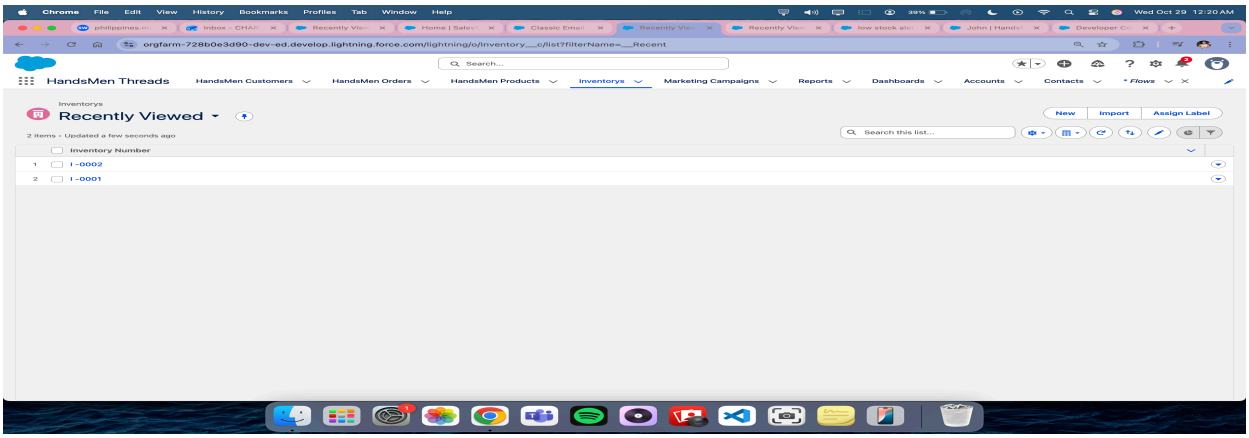
Order Confirmation Flow



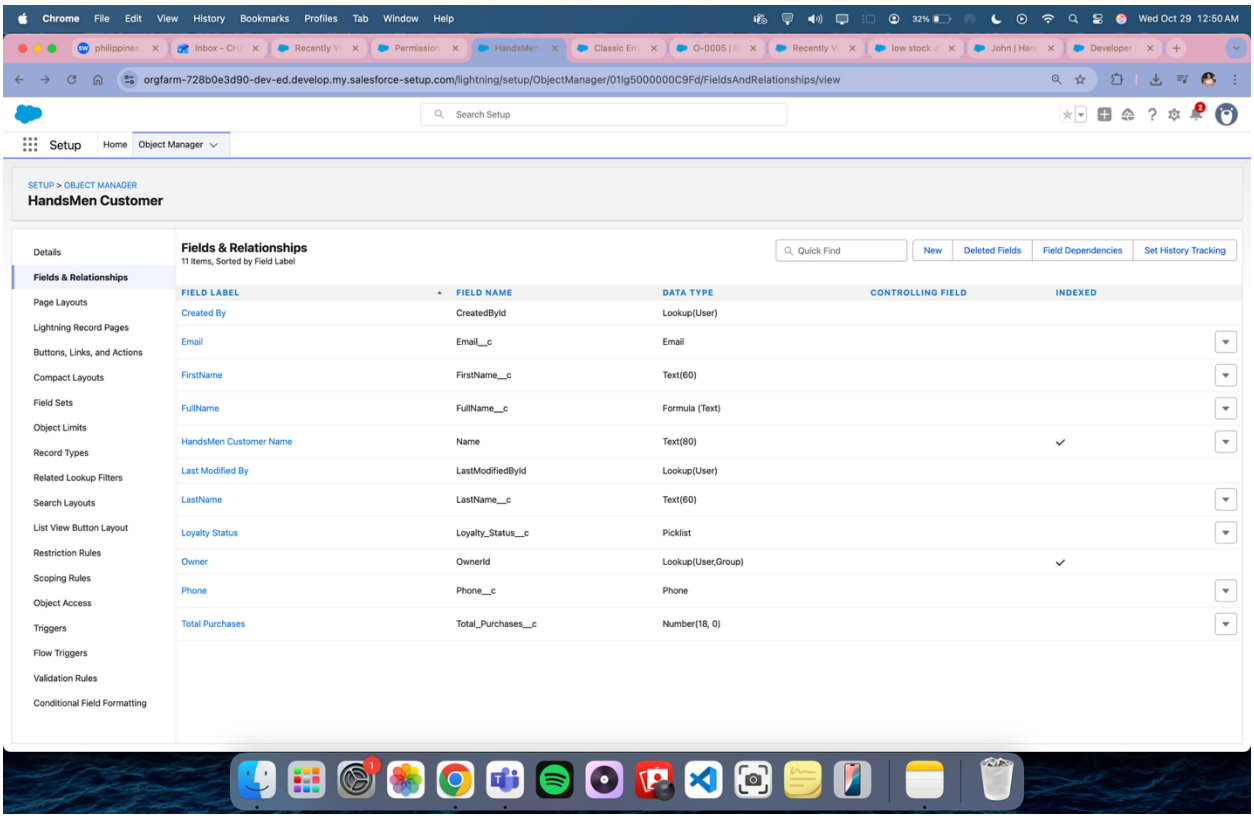
- Configured data security using Profiles, Roles, and Permission Sets.



- Developed batch jobs for inventory restocking and synchronization.



- Set up email templates for order confirmation, stock alerts, and loyalty programs.

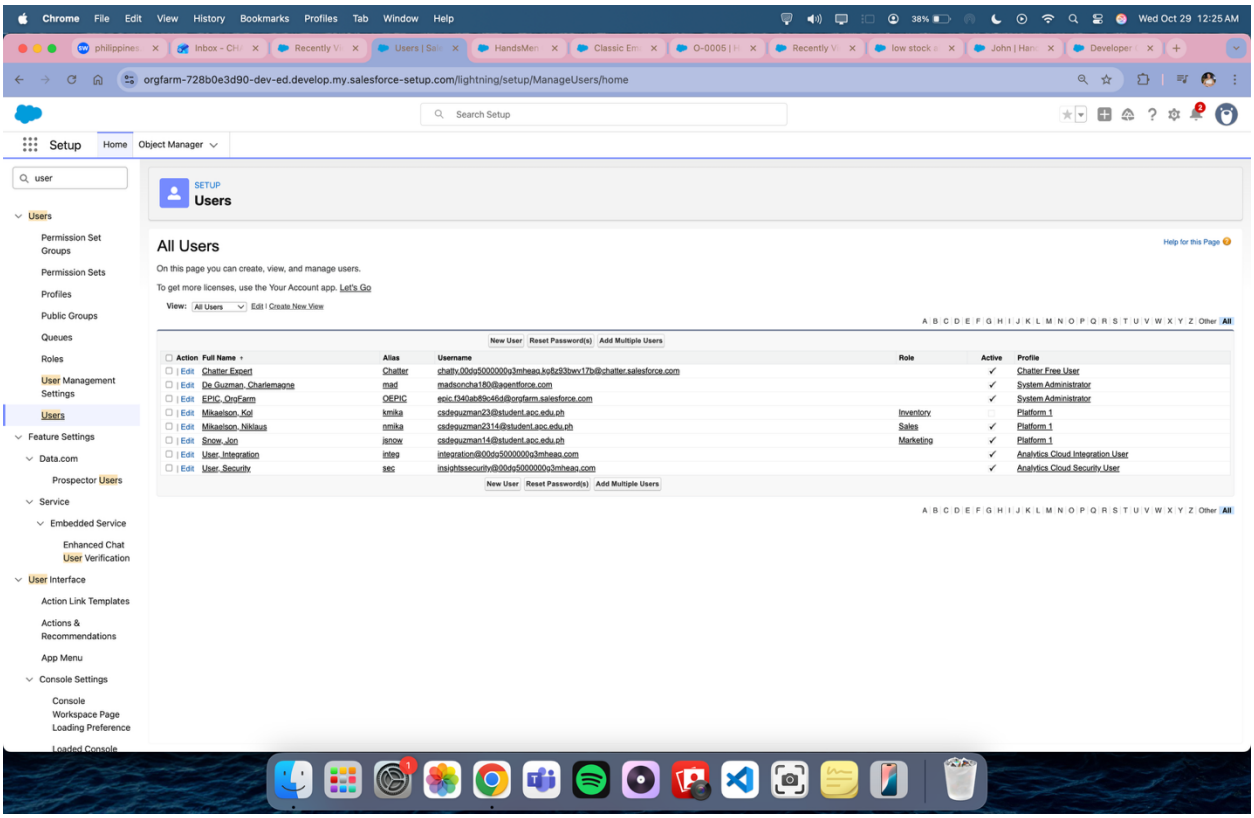


Phase 3: Testing & QA

- Performed unit testing for each automation feature.
- Conducted end-to-end testing with sample records for customers, orders, and inventory.
- Verified data consistency and validation of rule enforcement.
- Executed performance testing and basic security validation.

Phase 4: Deployment & Training

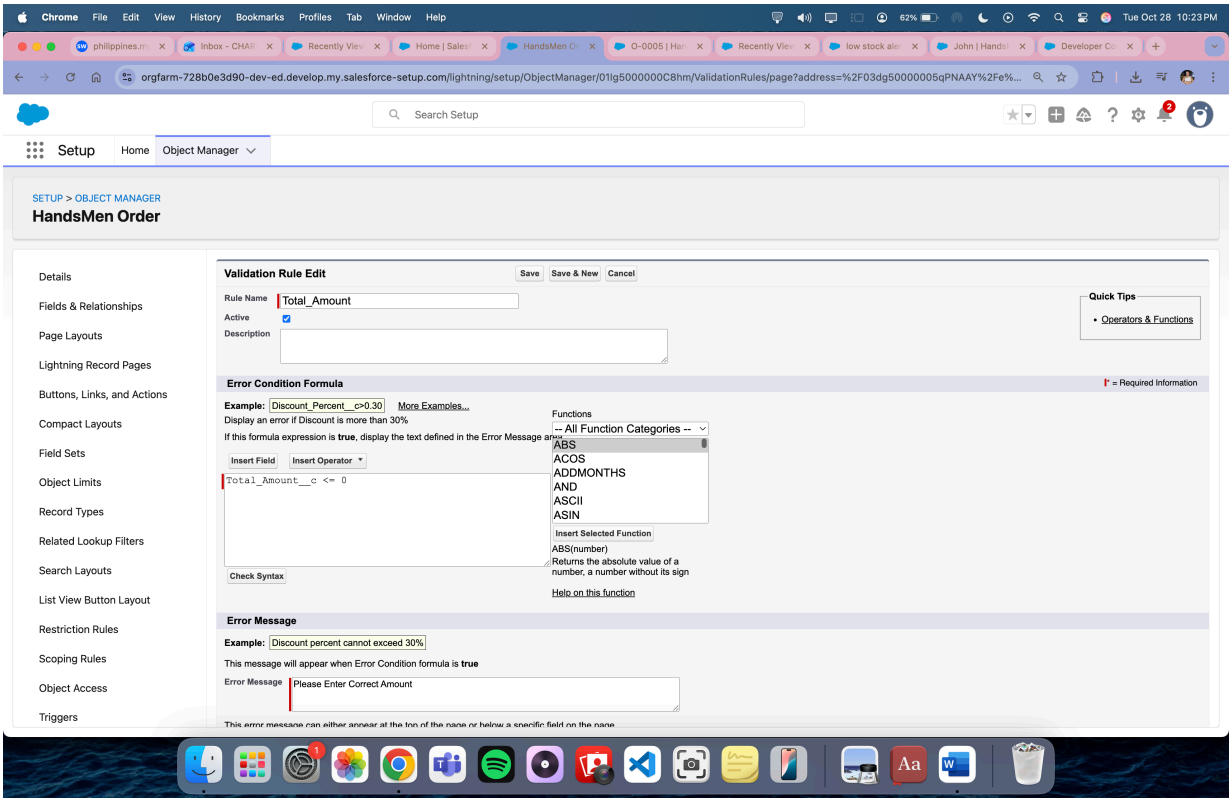
- Implemented configuration and automation in the production environment.
- Hold sales and inventory personnel training.
- Monitored behavior in the post-deployment system and responded to support.

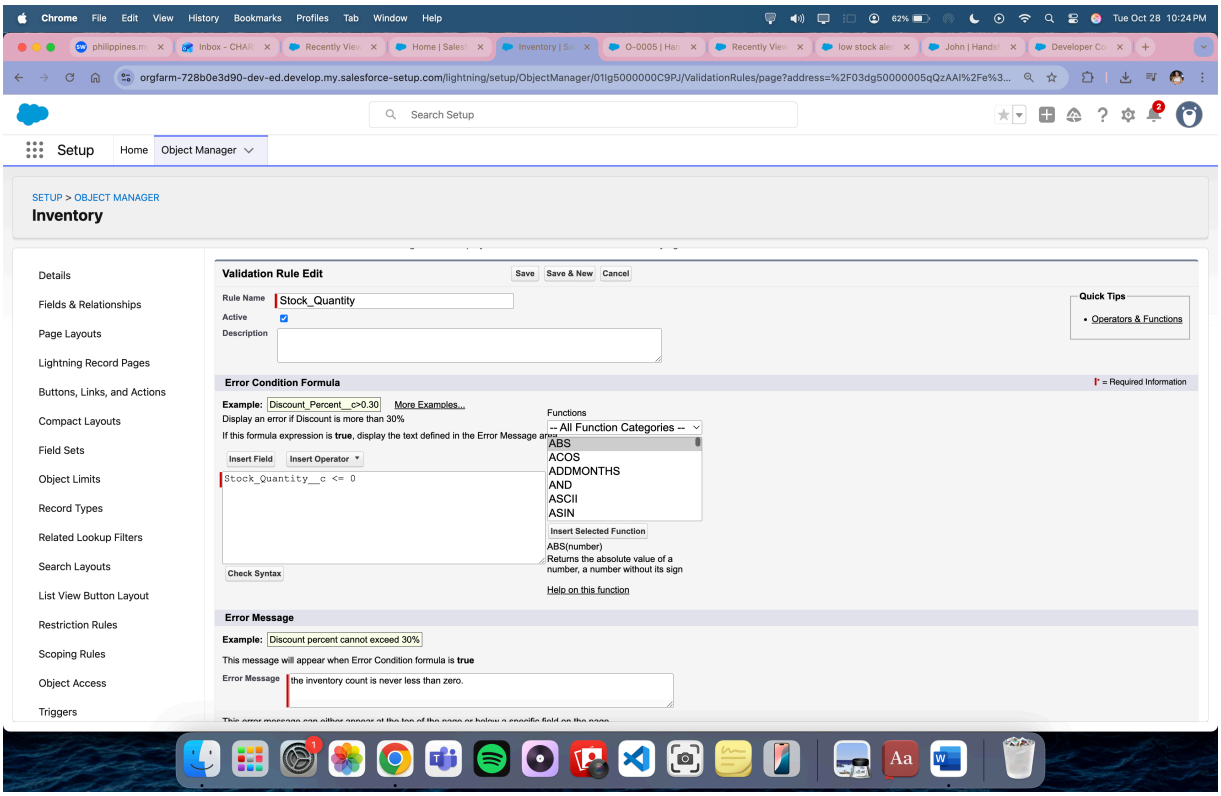


Detailed Execution of Project Components

1. Validation Rules

Object	Field	Validation Rule	Error Message
HandsMen Order__c	Total_Amount__c	Total_Amount__c <= 0	“Please Enter Correct Amount”
Inventory__c	Stock_Quantity__c	Stock_Quantity__c <= 0	“The inventory count is never less than zero.”
HandsMen Customer__c	Email	NOT CONTAINS(Email, "@gmail.com")	“Please fill Correct Gmail”

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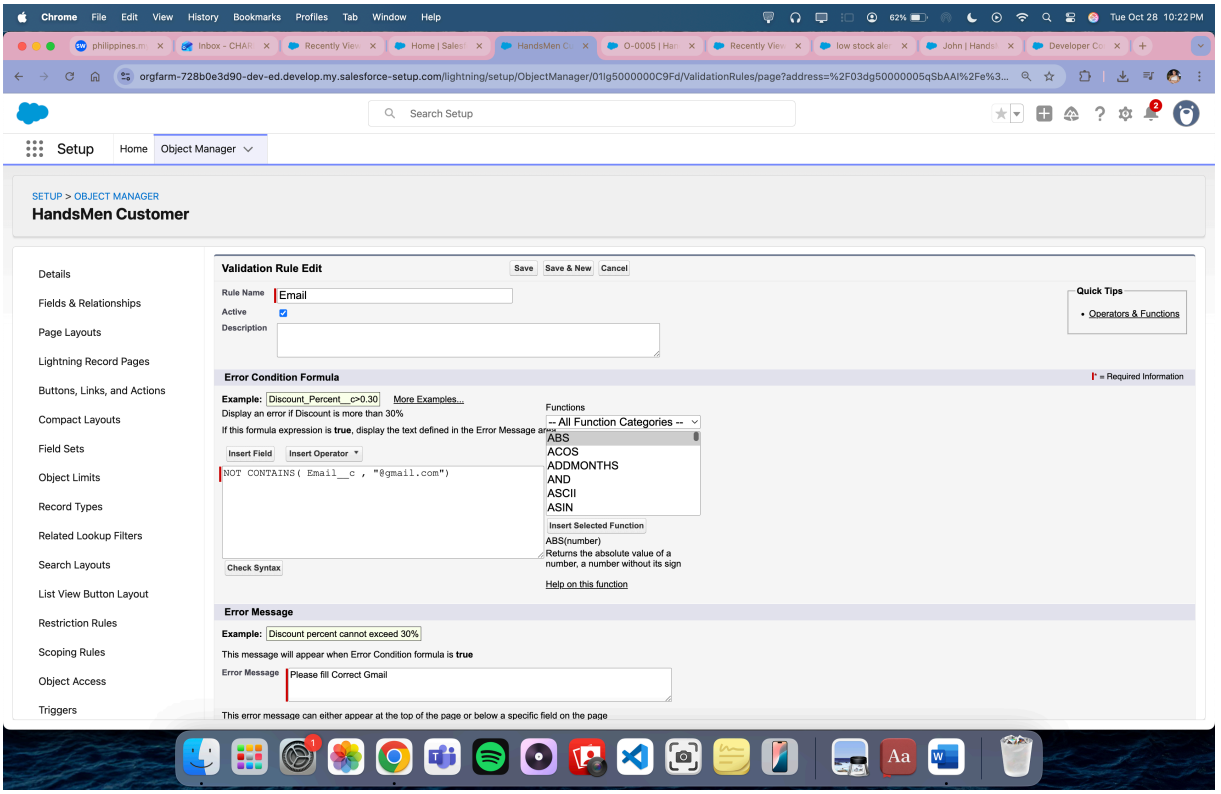
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Inventory
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Stock_Quantity
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
Stock_Quantity__c <= 0
Check Syntax
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
the inventory count is never less than zero.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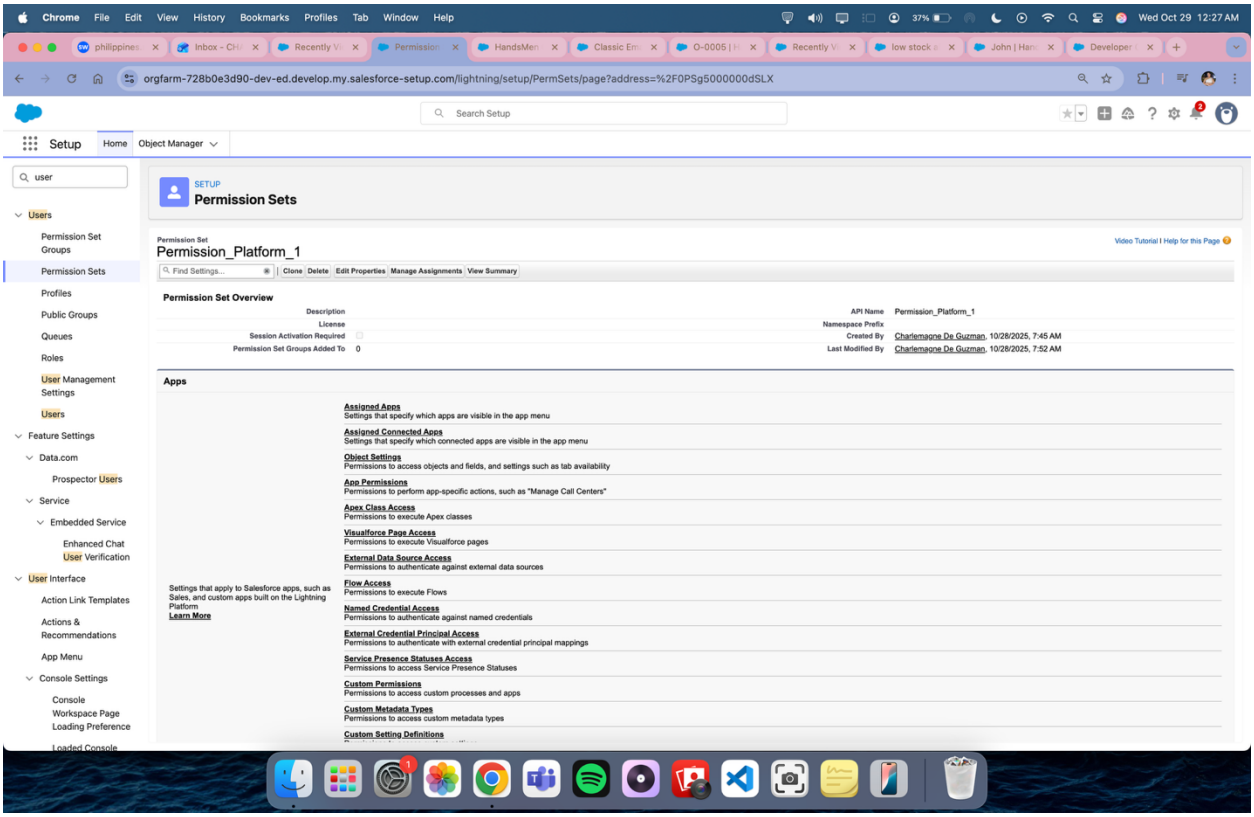
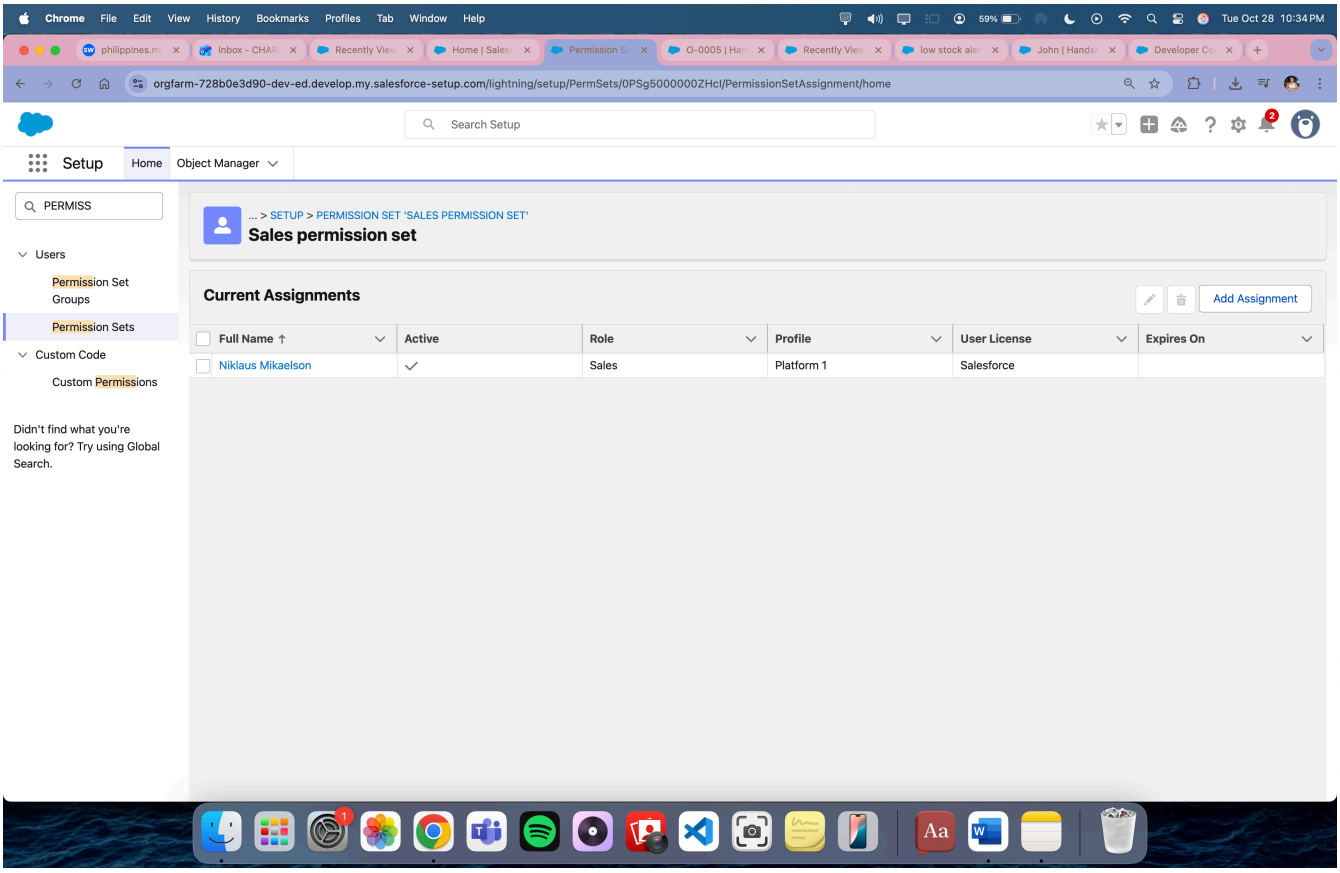
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
HandsMen Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Email
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
NOT CONTAINS(Email__c , "@gmail.com")
Check Syntax
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
Please fill Correct Gmail
This error message can either appear at the top of the page or below a specific field on the page

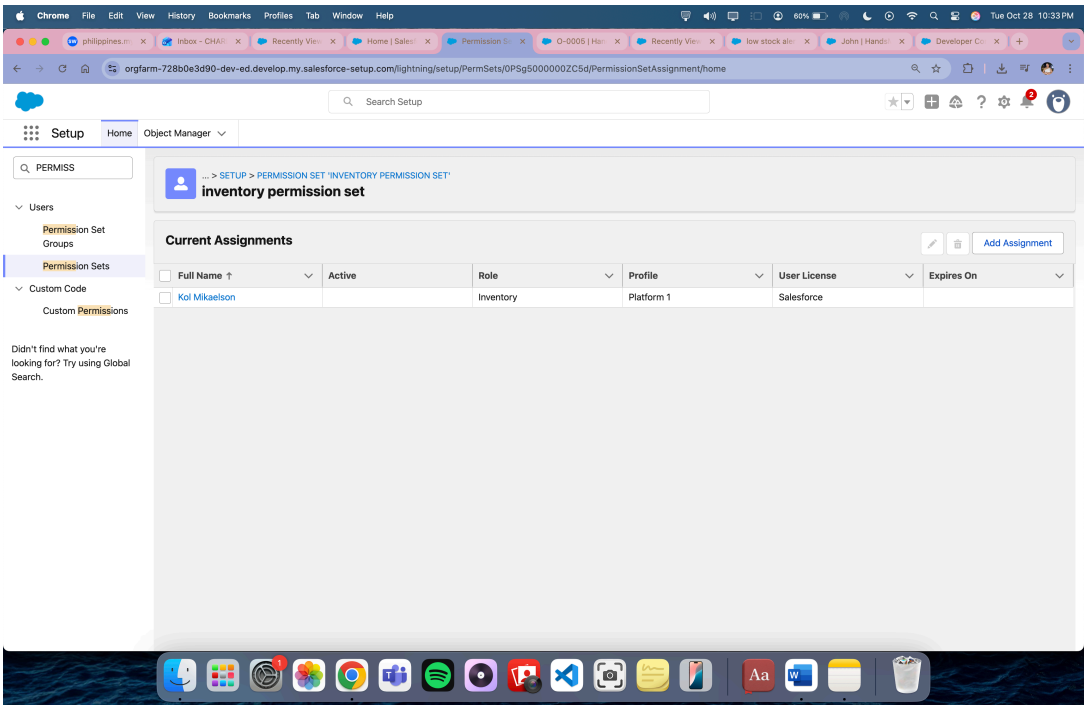
2. Profiles, Roles, and Users

- **Profile:** Cloned *Standard User* → Renamed *Platform 1*.



- Granted permissions for HandsMen Products and Inventory objects.
- **Role Hierarchy:** CEO → Sales → Inventory.
- **Users Created:**
    - Niklaus Mikaelson (Role: Sales)
    - Kol Mikaelson (Role: Inventory)
    - Jon Snow (Role: Marketing)

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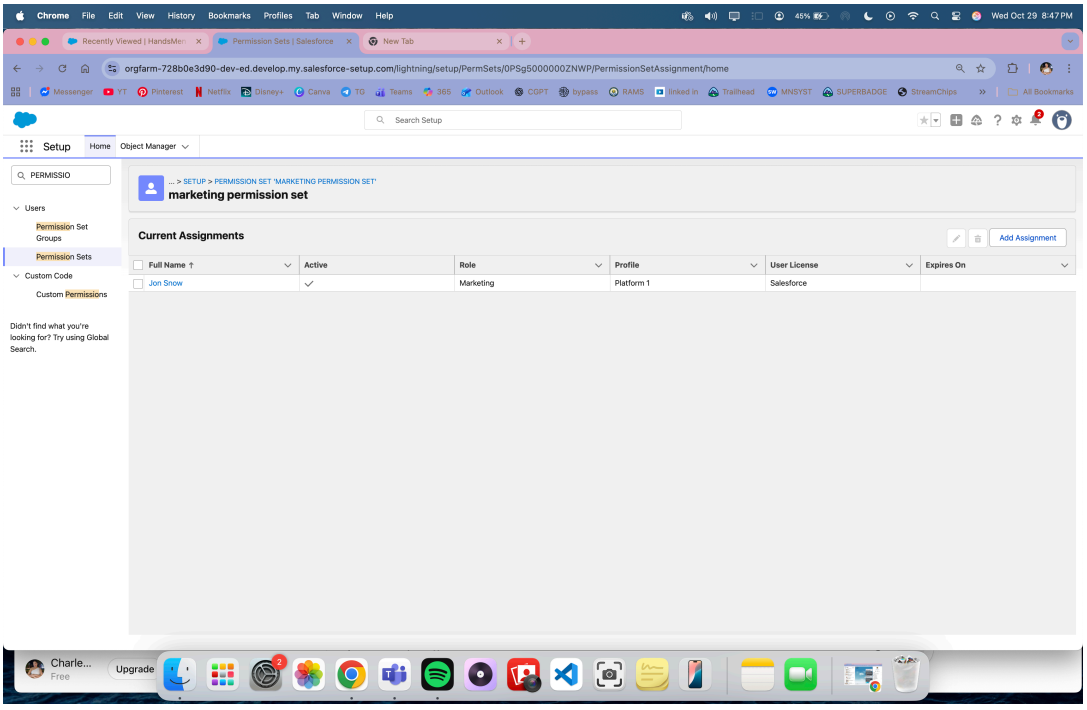
Setup
Home
Object Manager
PERMISS
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for? Try using Global Search.
... > SETUP > PERMISSION SET 'INVENTORY PERMISSION SET'
inventory permission set
Current Assignments
Add Assignment
Full Name
Active
Role
Profile
User License
Expires On
Kol Mikaelson
Inventory
Platform 1
Salesforce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PERMISSIO
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
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... > SETUP > PERMISSION SET 'MARKETING PERMISSION SET'
marketing permission set
Current Assignments
Add Assignment
Full Name
Active
Role
Profile
User License
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Jon Snow
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Platform 1
Salesforce
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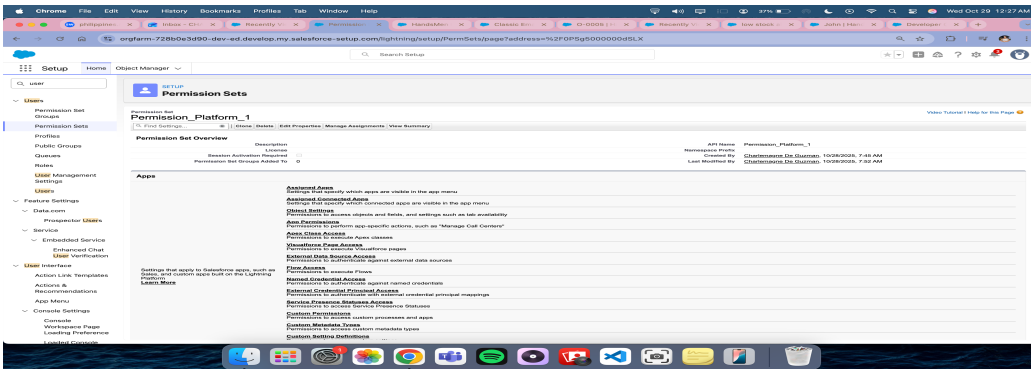
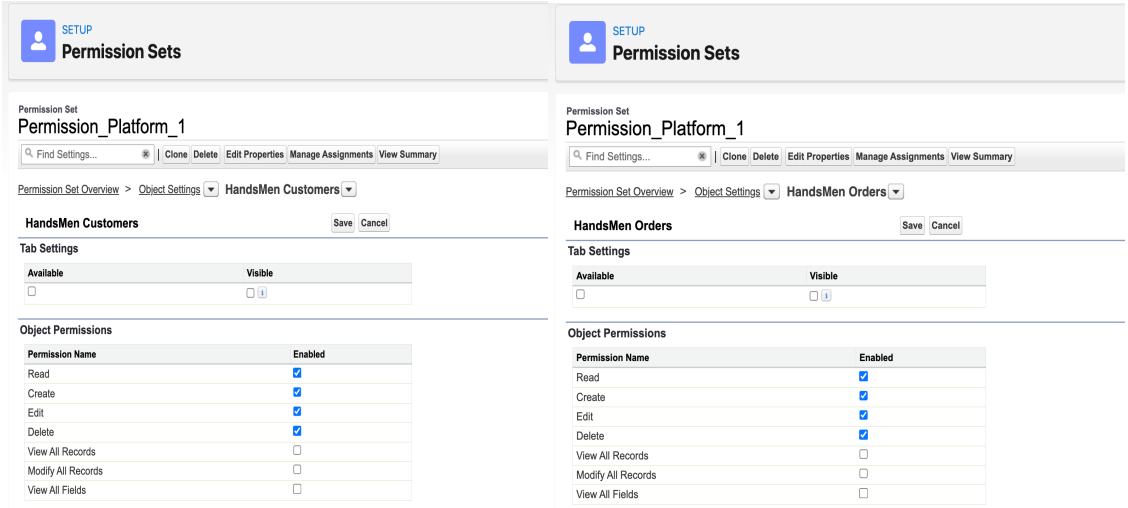
Free
Upgrade

3. Permission Set (Permission_Platform_1)

- Created permission set named **Permission_Platform_1**.



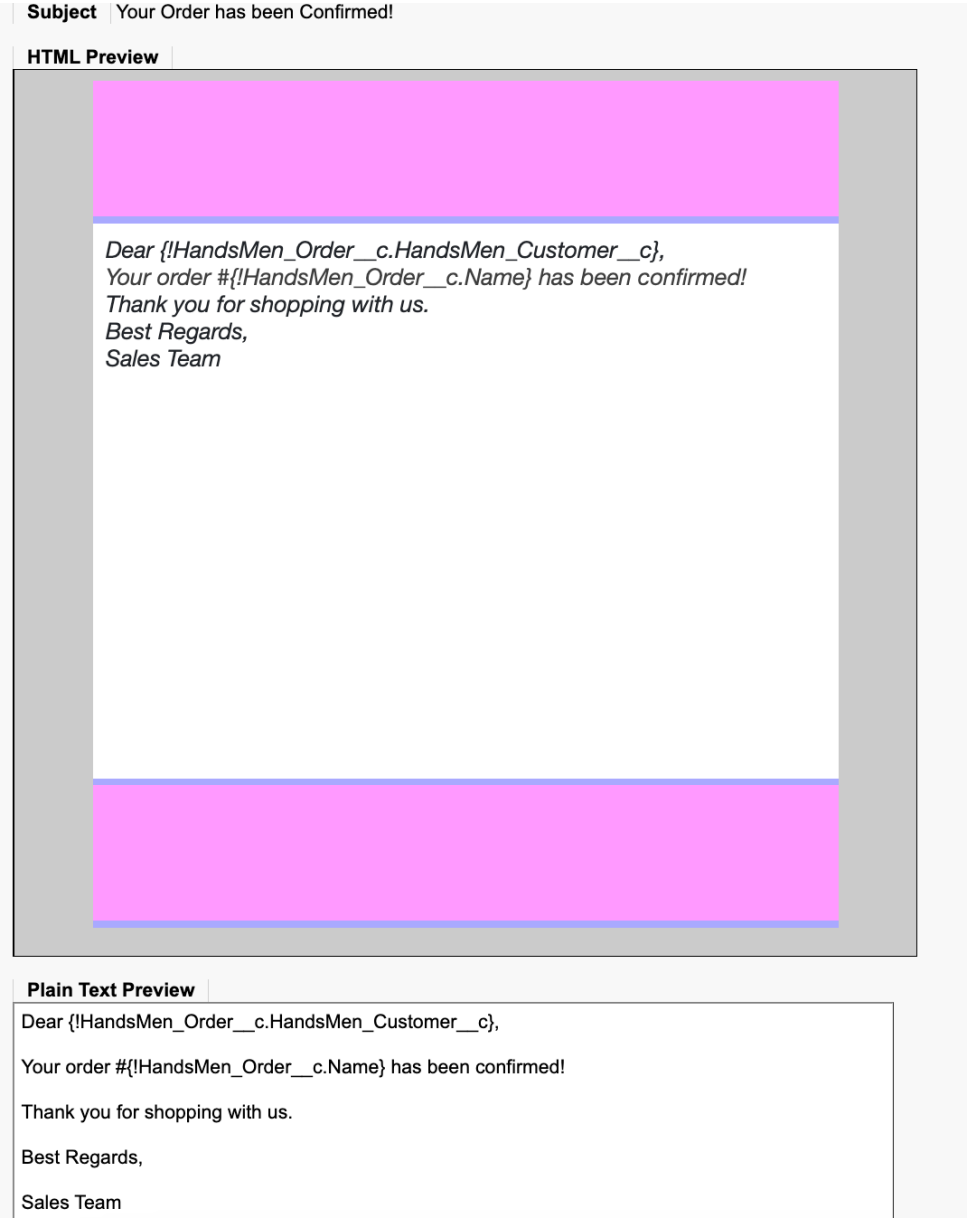
- Granted **Read, Create, Edit, Delete** access for *HandsMen Customer* and *HandsMen Order* objects.
- Assigned permission set to *Platform 1* users.



4. Classic Email Templates

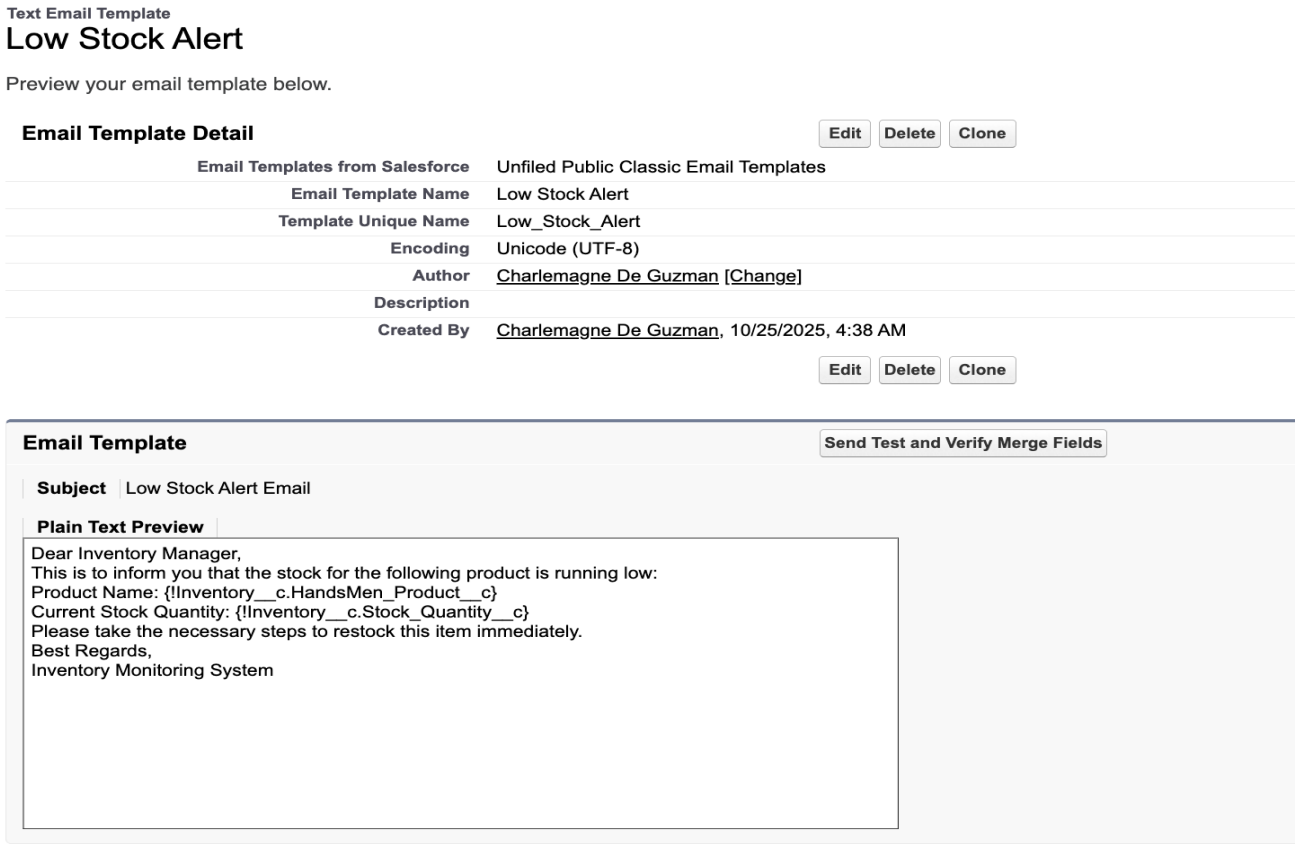
Created three email templates for customer communication:

1. **Order Confirmation Email**
   Subject: *Your Order has been Confirmed!*



2. **Low Stock Alert**

   Automated notification to inventory managers when stock is low.



Text Email Template

Low Stock Alert

Preview your email template below.

Email Template Detail Edit Delete Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Low Stock Alert
Template Unique Name	Low_Stock_Alert
Encoding	Unicode (UTF-8)
Author	Charlemagne De Guzman [Change]
Description	
Created By	Charlemagne De Guzman, 10/25/2025, 4:38 AM

Edit Delete Clone

Email Template Send Test and Verify Merge Fields

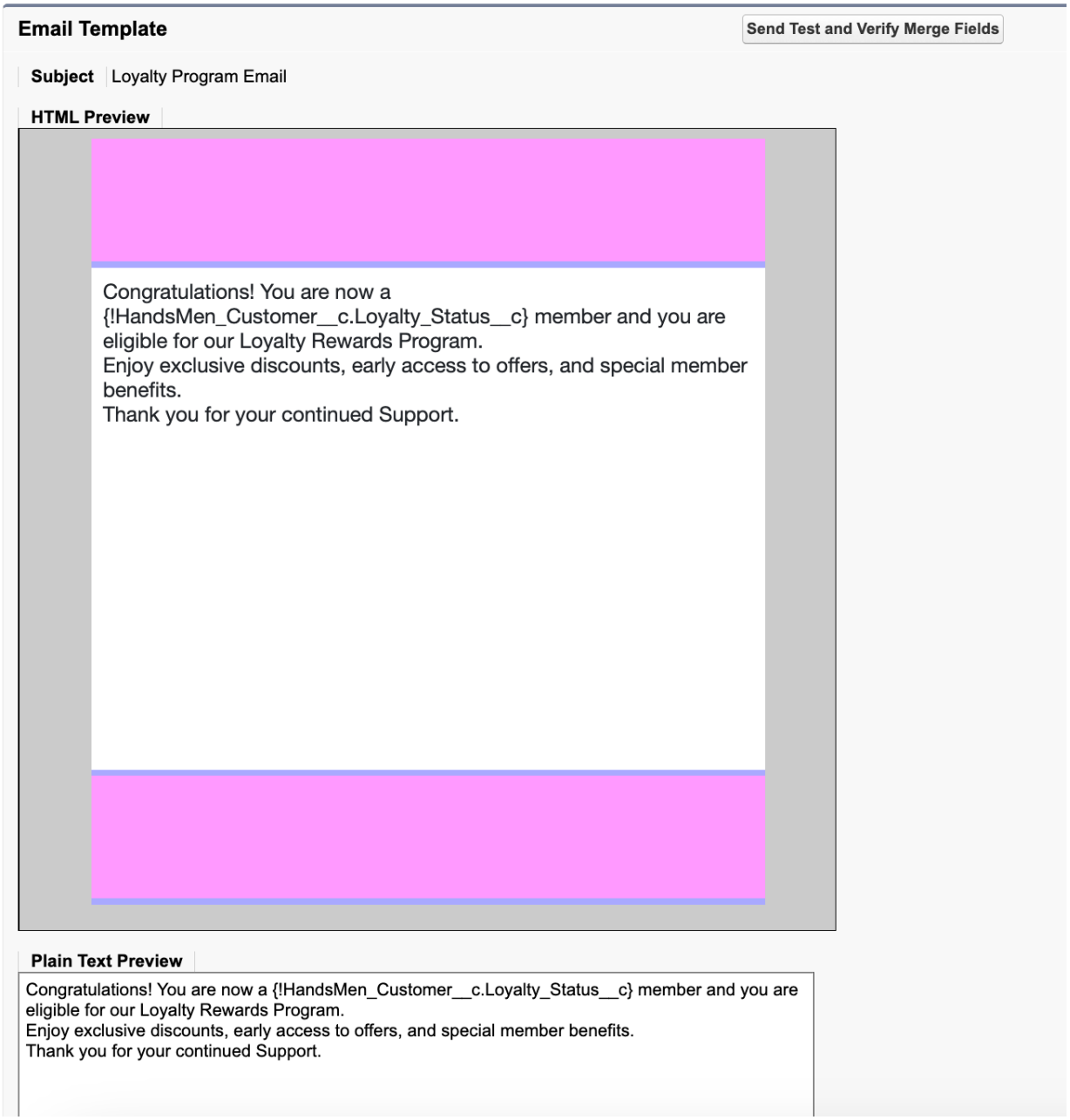
Subject Low Stock Alert Email

Plain Text Preview

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: {!Inventory__c.HandsMen_Product__c}
Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

3. **Loyalty Program Email**

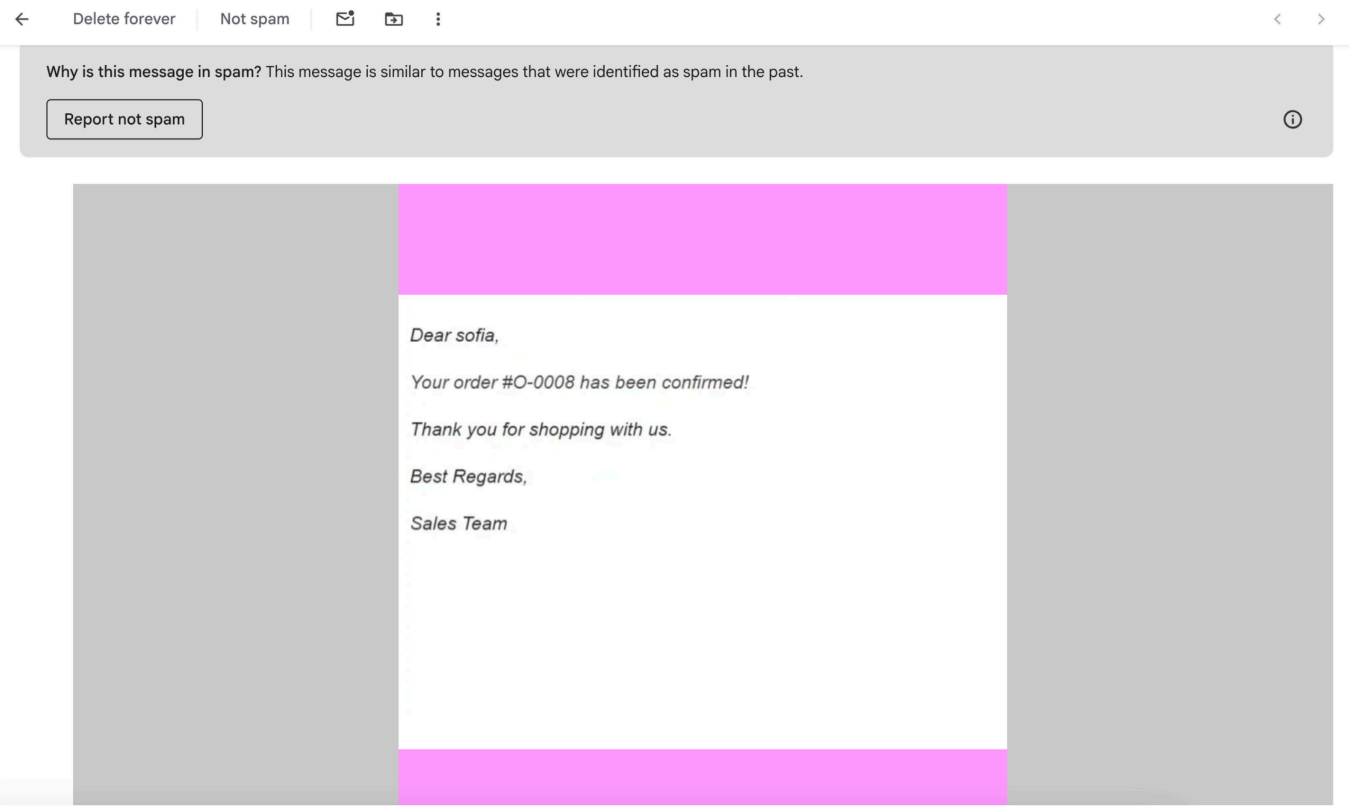
   Sent to customers when their loyalty tier is updated.



5. Email Alerts & Flows

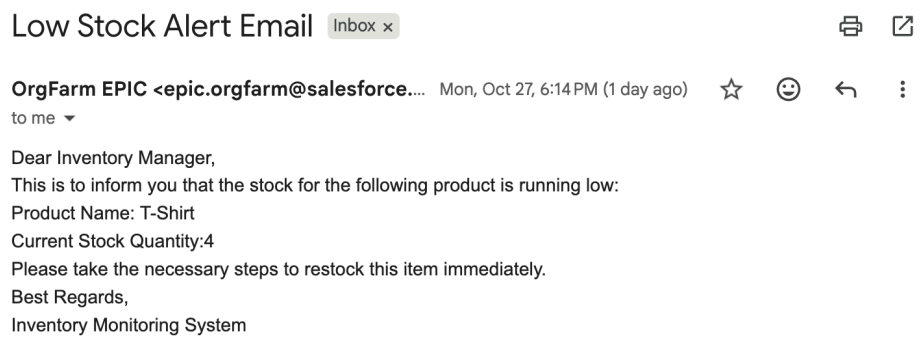
Order Confirmation Flow (Record-Triggered):

- Object: *Order__c*
- Trigger: *When record is updated*
- Condition: *Status = "Confirmed"*
- Action: Send *Order Confirmation Email Alert*



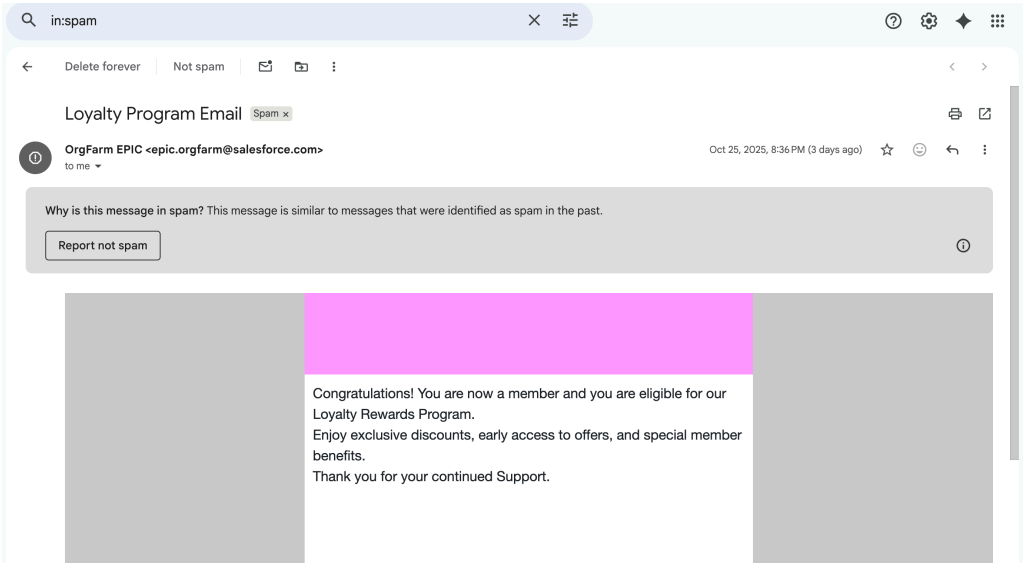
Stock Alert Flow (Record-Triggered):

- Object: *Inventory__c*
- Condition: *Stock_Quantity__c < 5*
- Action: Send *Low Stock Alert Email*



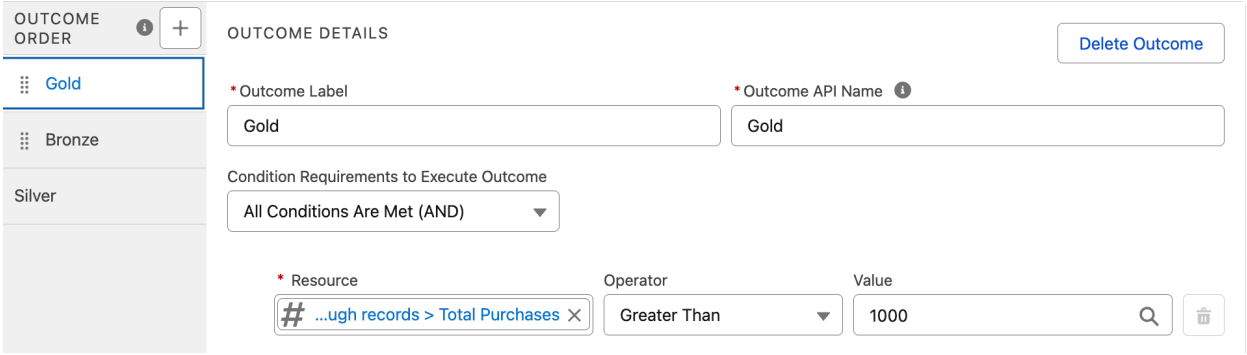
Loyalty Status Update (Scheduled Flow):

- Runs daily to update customer loyalty tiers:
  - *Gold:* Total Purchases > 1000
  - *Silver:* Between 500–1000
  - *Bronze:* < 500



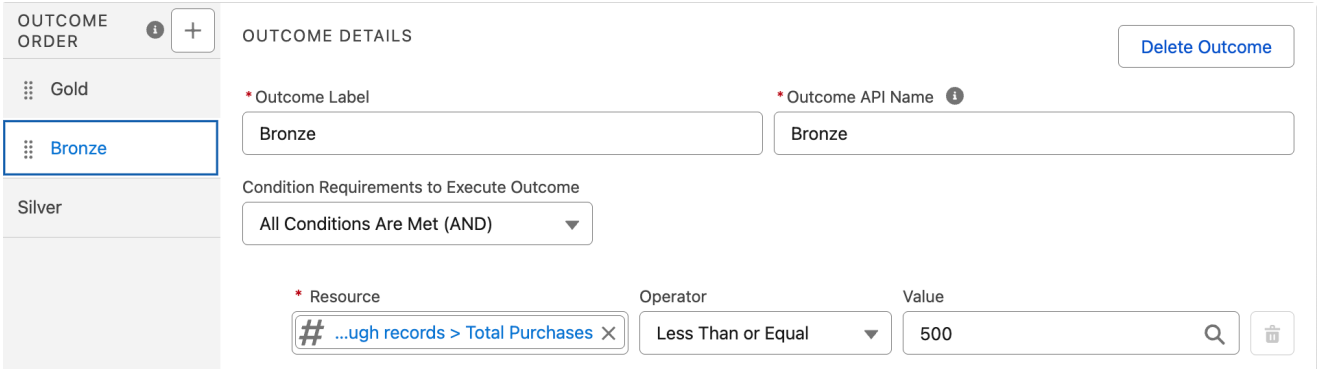
Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.



Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.

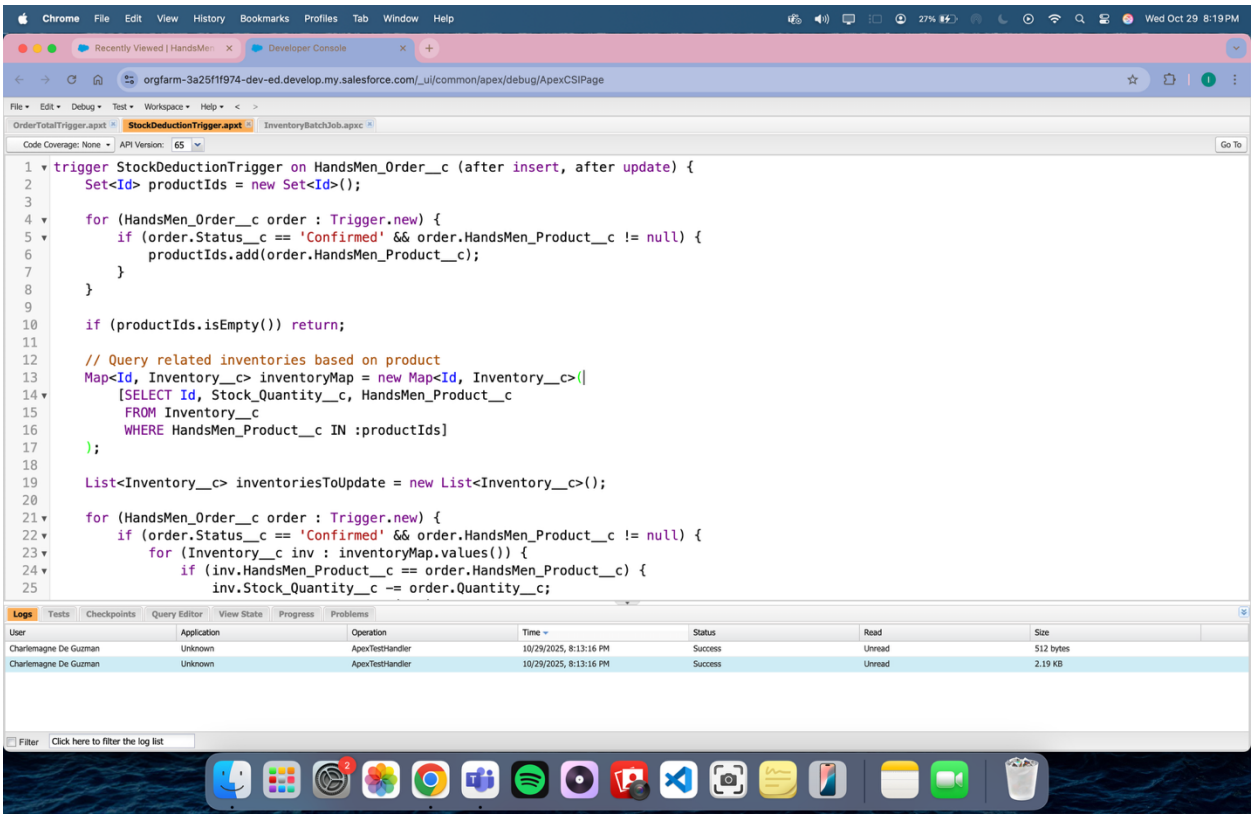


Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.

6. Apex Class and Trigger

Apex Class: StockDeductionTrigger



trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) { Set productIds = new Set();

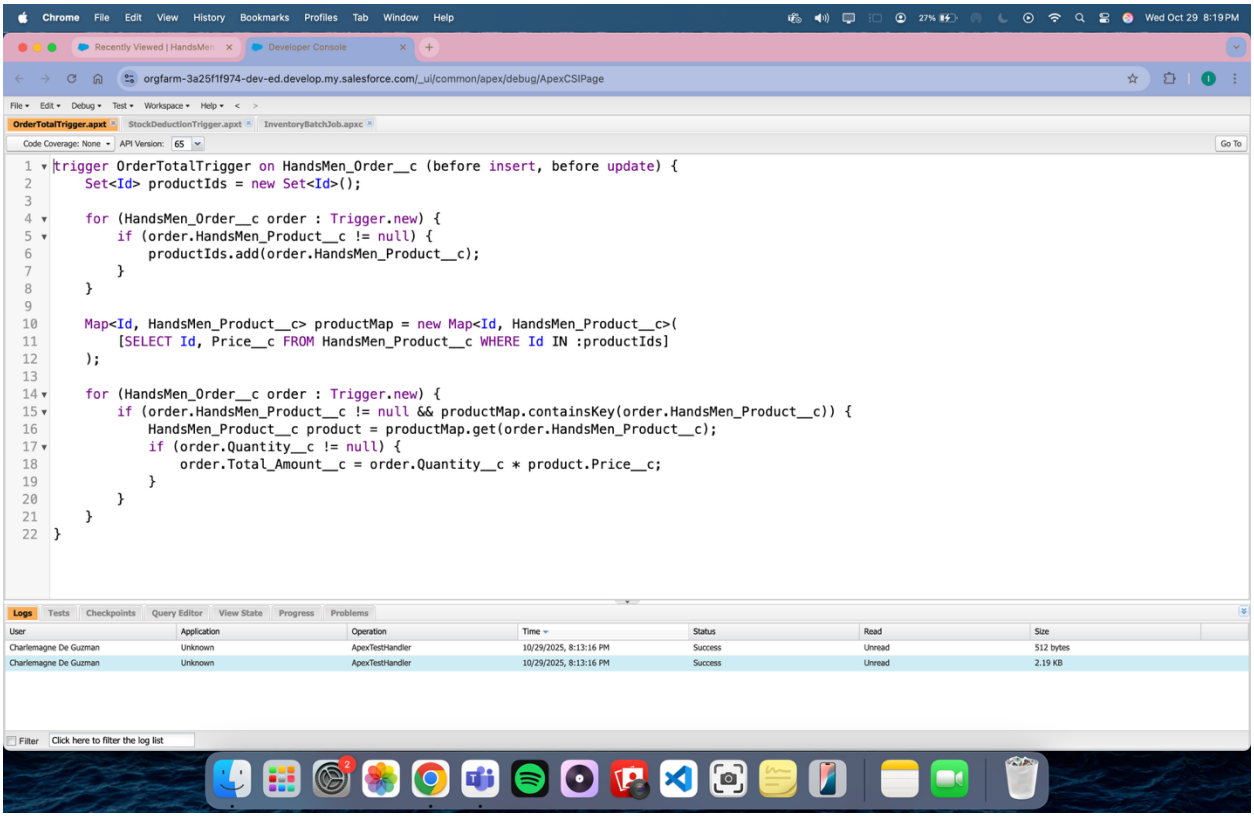
```
for (HandsMen_Order__c order : Trigger.new) {
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
        productIds.add(order.HandsMen_Product__c);
    }
}
```

```
if (productIds.isEmpty()) return;
```

```
// Query related inventories based on product
Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
    [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
     FROM Inventory__c
     WHERE HandsMen_Product__c IN :productIds]
```

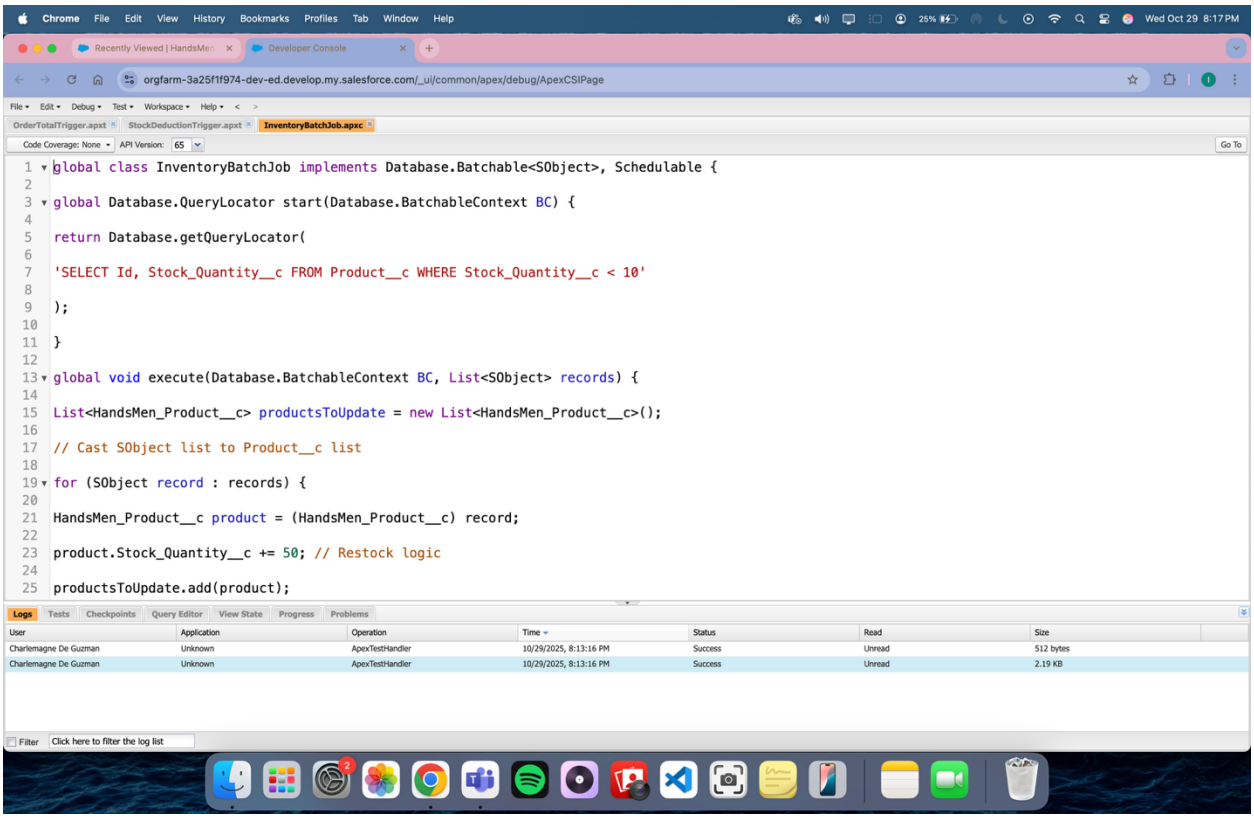
```
);

List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

for (HandsMen_Order__c order : Trigger.new) {
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
        for (Inventory__c inv : inventoryMap.values()) {
            if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                inv.Stock_Quantity__c -= order.Quantity__c;
                inventoriesToUpdate.add(inv);
                break;
            }
        }
    }
}

if (!inventoriesToUpdate.isEmpty()) {
    update inventoriesToUpdate;
}


}
```

Apex Trigger: OrderTotalTrigger



7. Apex Batch Class and Scheduling

Apex Class: InventoryBatchJob



global class InventoryBatchJob implements Database.Batchable, Schedulable {

global Database.QueryLocator start(Database.BatchableContext BC) {

return Database.getQueryLocator(

'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'

);

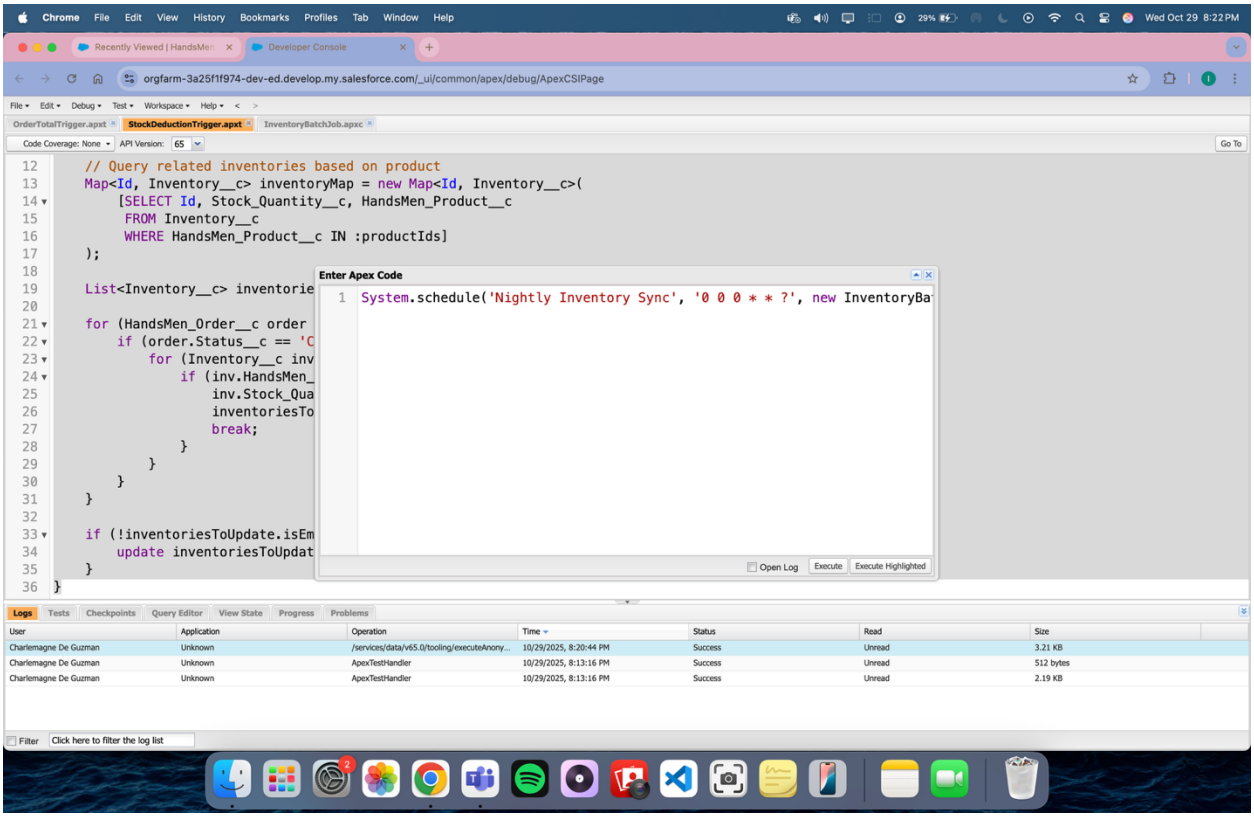
}

global void execute(Database.BatchableContext BC, List records) {

List productsToUpdate = new List();

```
// Cast SObject list to Product__c list
for (SObject record : records) {
HandsMen_Product__c product = (HandsMen_Product__c) record;
product.Stock_Quantity__c += 50; // Restock logic
productsToUpdate.add(product);
}
if (!productsToUpdate.isEmpty()) {
try {
update productsToUpdate;
} catch (DmlException e) {
System.debug('Error updating inventory: ' + e.getMessage());
}
}
}
global void finish(Database.BatchableContext BC) {
System.debug('Inventory Sync Completed');
}
// Scheduler Method
global void execute(SchedulableContext SC) {
InventoryBatchJob batchJob = new InventoryBatchJob();
Database.executeBatch(batchJob, 200)
```

Scheduling Command:



System.schedule('Daily Inventory Sync', '0 0 0 * * ?', new InventoryBatchJob());

Testing and Quality Assurance

- All the validation rules were applied to valid and invalid data.
- Test records were checked using email alerts.
- Classes that had apex code passed without runtime errors.
- The executed batch job was successful and automatically updated low-stock products.
- For proper access control, user roles and permission sets were checked.
-

Deployment Summary

- Successfully deployed the full Salesforce configuration to production.
- User training was conducted for Sales and Inventory personnel.
- Post-deployment monitoring confirmed stable operations with accurate data flow.

Conclusion

- The HandsMen Threads Salesforce implementation project was a successful project that turned traditional business operations into an intelligent automated CRM environment. The system enhanced order management, minimized human error, and increased overall productivity through the integration of Apex programming, Flows and declarative tools.

- Along with enhancing technical expertise in Salesforce, this capstone project illustrates a possibility of cloud CRM solutions in facilitating digital change in the retail fashion sector.