Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

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

SUBMITTED BY:

AUSTIN JERICHO CALVELO PINEDA

BSIT - 3

POLYTECHNIC UNIVERSITY OF THE PHILIPPINES – LOPEZ CAMPUS

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

PROJECT OVERVIEW:

This project showcases the development of a fully customized Salesforce CRM for **HandsMen Threads**, a high-end menswear and tailoring company. The goal of the implementation was to optimize internal workflows, strengthen customer relationships, and ensure consistent, accurate data across all business units.

The CRM was built with a carefully planned data architecture that includes five primary custom objects: **Customer**, **Order**, **Product**, **Inventory**, and **Marketing Campaign**. Key business activities were automated through **Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex**, allowing the system to manage order notifications, update loyalty levels, and send advance alerts when stock levels drop.

To maintain data accuracy and protect sensitive records, the setup incorporated strict **validation rules** and a **role-based security model** tailored to the Sales, Inventory, and Marketing departments. In addition, a dedicated **Apex batch process** runs on schedule to monitor and update items with low inventory.

Overall, this CRM implementation improved operational productivity through automation, enhanced customer satisfaction with personalized communication, and created a scalable system capable of supporting future business expansion on the Salesforce platform.

OBJECTIVE:

The primary goal of this project is to design and deploy a tailored Salesforce CRM solution for HandsMen Threads that optimizes business workflows, protects data accuracy, and elevates overall customer experience.

Through the development of a centralized platform that manages customers, orders, products, inventory, and marketing initiatives, this project intends to:

- Automate critical business activities including order confirmation emails, loyalty level updates, and inventory stock warnings.

- Maintain clean, reliable data across departments with the use of validation rules and structured data input.

- Provide real-time insights into customer engagement and inventory status for faster and more informed decision-making.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

- Enhance collaboration among Sales, Marketing, and Inventory teams through role-based permissions and secure access controls.

- Strengthen customer relationships by delivering personalized communication and loyalty-focused marketing strategies.

TECHNOLOGY DESCRIPTION:

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform designed to help organizations manage customer information, automate business processes, and enhance sales, service, and marketing performance. It offers both point-and-click configuration tools and programmatic features such as Apex and Flows to build customized business solutions.

Custom Objects

Objects in Salesforce function like tables in a database. Custom Objects are created to store business-specific information.

Examples:

- **Customer__c** – Contains customer details

- **Product__c** – Stores product information

- **Order__c** – Tracks orders placed by customers

Tabs

Tabs allow users to access object records directly from the Salesforce interface.

Example:
A **Product** tab provides quick access to view, create, and manage product records.

Custom App

A Salesforce App is a set of tabs and components grouped together to support a particular business function or department.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

Profiles

Profiles determine what a user is allowed to access and perform in Salesforce. They control object permissions, field-level access, and general user capabilities.

Roles

Roles define the level of record visibility for users based on the organization's role hierarchy. They are used for sharing rules and reporting purposes.

Permission Sets

Permission Sets provide additional access or capabilities to users without modifying their profile. They are used to assign extra permissions when needed.

Validation Rules

Validation Rules verify that the data entered into Salesforce meets business requirements before saving.

Examples:

- Email must contain **@gmail.com**

- Stock quantity cannot be negative

Email Templates

Email Templates are predefined message formats used to send emails to customers or internal users.

Example:
An **Order Confirmation** email template sent after a purchase.

Email Alerts

Email Alerts are automated actions—usually triggered through Flows or Workflow Rules—that send emails using specific templates.

Example:
Automatically sending a notification to customers when their loyalty status is updated.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

Flows

Flows are no-code automation tools used to execute business logic such as creating or updating records, sending alerts, or guiding users through screens.

Example:
A flow that sends an order confirmation email whenever a new order is created.

Apex

Apex is Salesforce's programming language used for complex automation and business logic that cannot be achieved through point-and-click tools.

Example (Trigger use case):

- Recalculate total order amount after items are added

- Reduce inventory count when an order is confirmed

DETAILED EXECUTION OF PROJECT PHASE

1. Developer Org Setup A Salesforce Developer Org was created using
https://developer.salesforce.com/signup**.**

The account was verified, password set, and access was granted to the Salesforce Setup page.
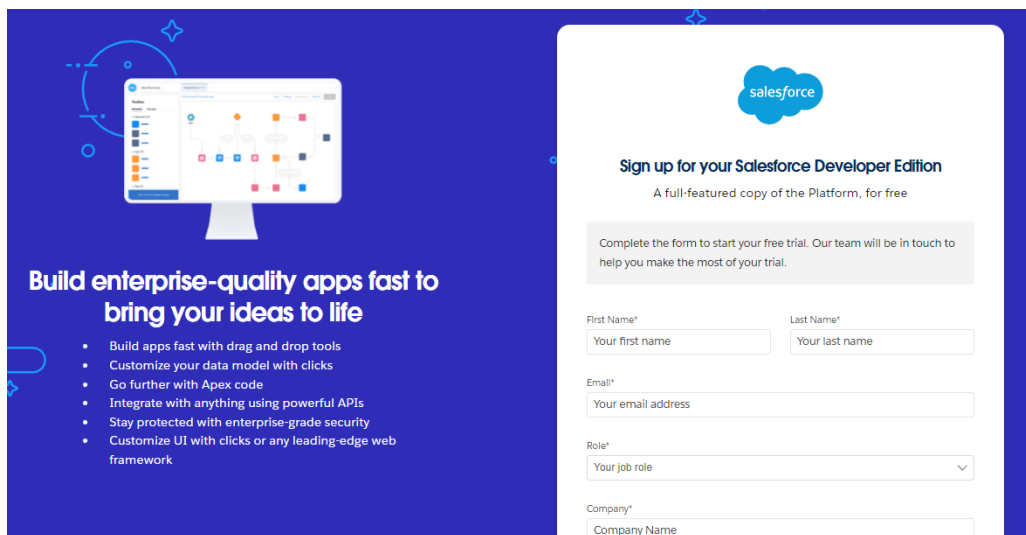
Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
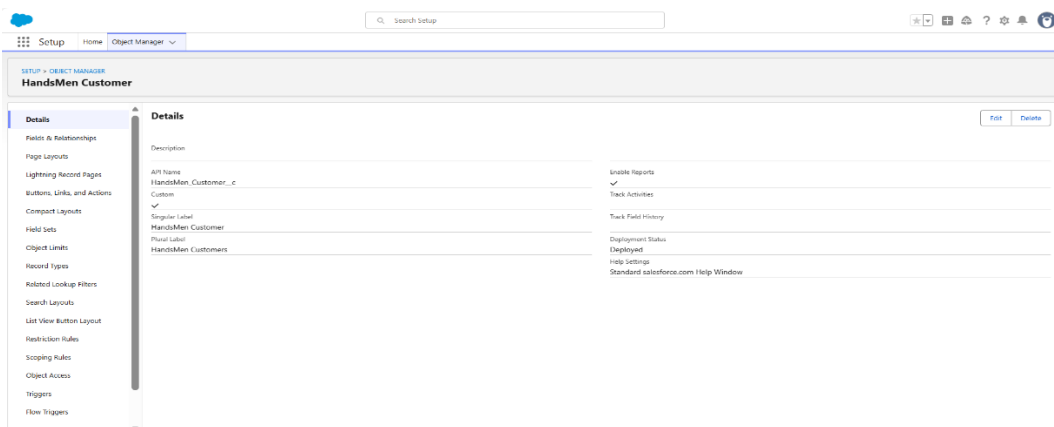**Bachelor of Science in Information Technology**

2. Custom Object Creation

To capture and manage key business data, five custom objects were created in Salesforce:

- **HandsMen Customer –** Stores customer information such as name, email, phone number, and loyalty status.

- **HandsMen Product –** Maintains product catalog details including SKU, price, and available stock.

- **HandsMen Order –** Records customer orders with details like quantity, order date, and status.

- **Inventory –** Tracks stock levels and warehouse locations for each product.

- **Marketing Campaign –** Stores details of promotional campaigns, including scheduling and target audience.

Steps Followed to Create Custom Objects:

- **Navigate to Setup → Object Manager → Create → Custom Object.**

- Enter the Label and Object Name, and enable options such as Reports and Allow Search.

- Save the custom object.

- Create a Tab for each object to allow easy access to its records from the Salesforce interface.

This structured setup ensures that all critical business data is stored in a centralized and easily manageable way, ready for automation and reporting.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

3. Creating the Lightning App

- A custom **Lightning App** named **HandsMen Threads** was created to centralize all key business operations.

- The app included the following **tabs**: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, Marketing Campaign, Reports, and others as needed.

- The app was **assigned** to the **System Administrator** profile for full access and management capabilities.

4. Validation Rules

To ensure **accurate data entry** and enforce **business logic**, the following validation rules were implemented:

- **Order Object** – Prevents saving an order if the **Total Amount ≤ 0**.
  Error Message: "Please Enter Correct Amount"

- **Customer Object** – Validates that the **Email field contains @gmail.com**.
  Error Message: "Please fill Correct Gmail"

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Austin

Email

⊘ austin

Enter a valid email address, such as name@email.com.

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Owner
Austin Pineda

⊘ **We hit a snag.** ✕
Review the following fields
  • Email

⊘   Cancel   Save & New   **Save**

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

5. User Role & Profile Setup

1. The **Standard User** profile was cloned to create a new profile named **Platform 1**, which was then granted access to all necessary custom objects.

2. **Roles** were created for different departments to control data visibility and hierarchy:

   - Sales Manager

   - Inventory Manager

   - Marketing Team

6. User Creation

1. Users were added to Salesforce and assigned **appropriate roles and profiles** according to their responsibilities:

   - **Niklaus Mikaelson** – Assigned the **Sales Manager** role

   - **Kol Mikaelson** – Assigned the **Inventory Manager** role

2. These role-based assignments ensure **secure data access**, proper workflow control, and accurate process management within the system.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
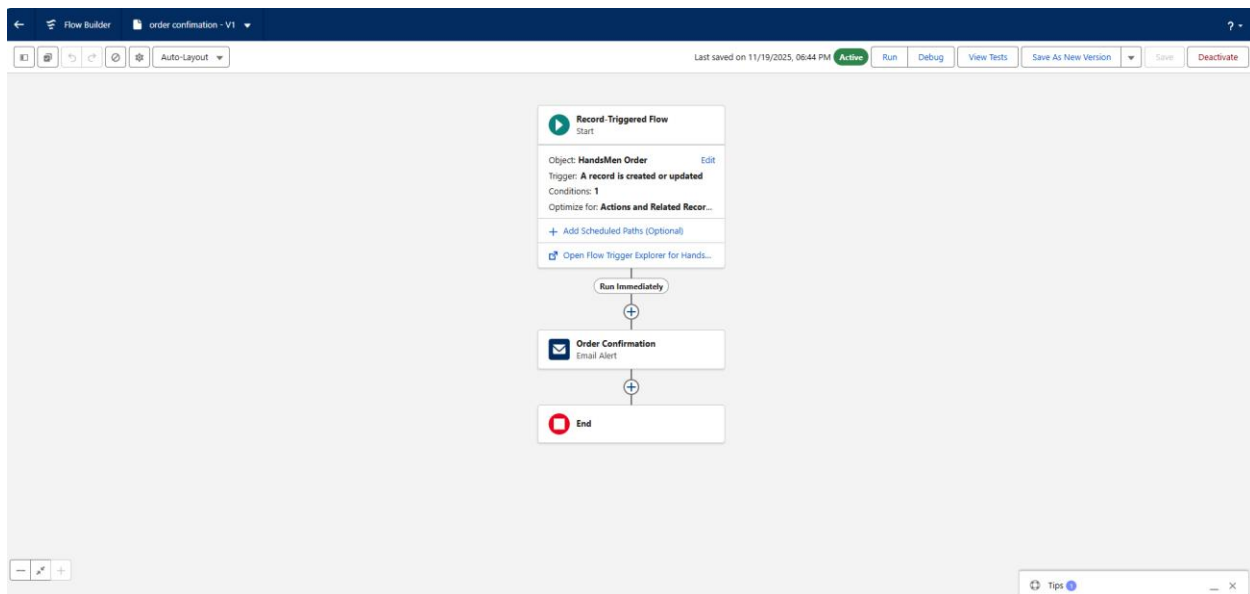Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

7. Email Templates & Alerts

1. Created the following **email templates** for automated communication:

    - **Order Confirmation** – Sent when an order status is updated to *Confirmed*.

    - **Low Stock Alert** – Triggered when inventory levels fall below 5 units.

    - **Loyalty Program Update** – Sent whenever a customer's loyalty status changes.

2. **Email Alerts** were configured for each template and linked to **automation flows** to ensure timely and accurate notifications.

Republic of the Philippines
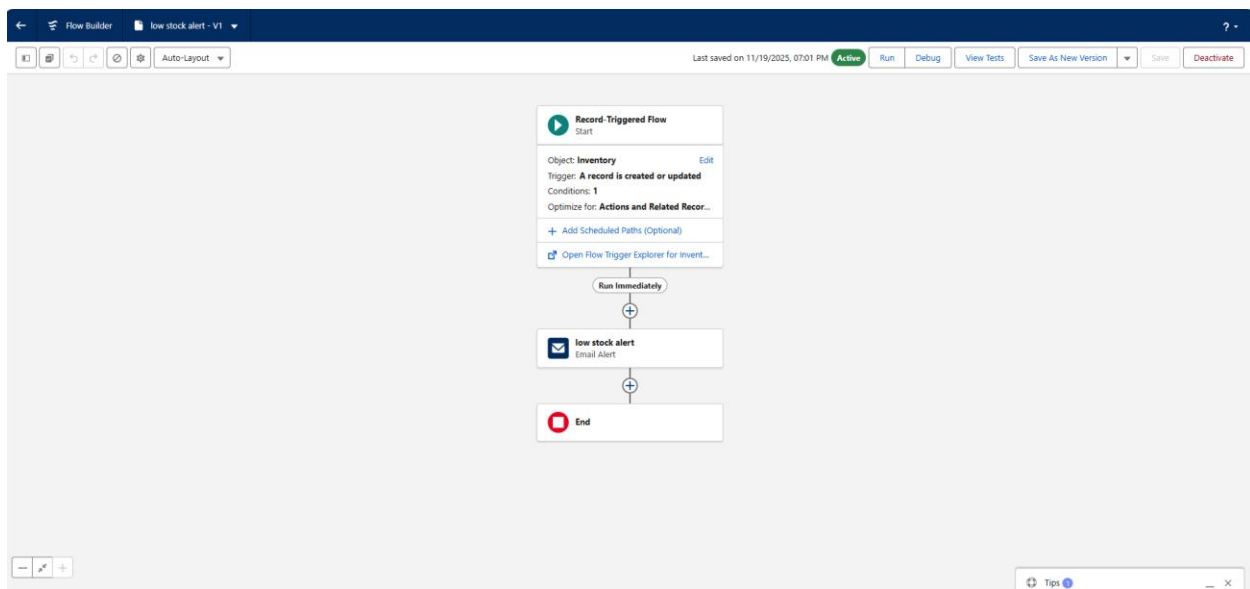**POLYTECHNIC UNIVERSITY OF THE PHILIPPINES**
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

8. Flow Implementations

A. Order Confirmation Flow

- Triggered automatically when an order is updated to *Confirmed*.

- Sends a personalized **Order Confirmation email** to the associated customer, ensuring they are promptly informed of their order status.

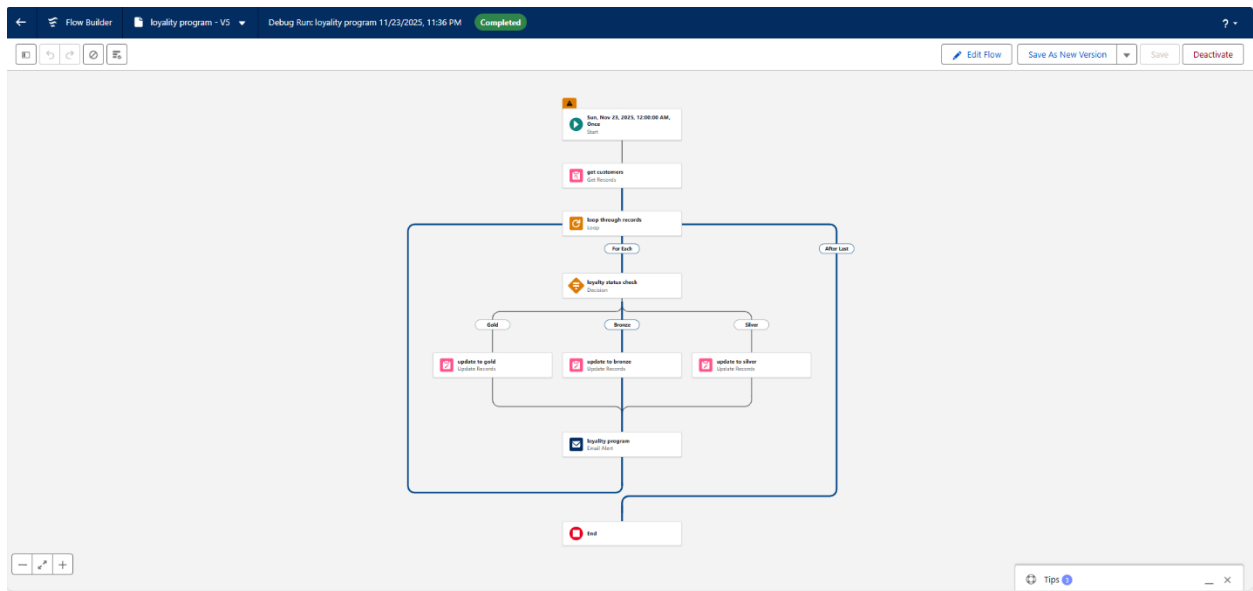Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

B. Stock Alert Flow

- Triggered automatically when a product's inventory falls below 5 units.

- Sends a **Low Stock Alert email** to the **Inventory Manager** to ensure timely restocking.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

C. Scheduled Loyalty Update Flow

- Runs **daily at midnight**.

- Iterates through all customers and updates their **Loyalty Status** based on cumulative purchases, ensuring the loyalty program is always current.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

8. Apex Triggers

1. **Order Total Trigger**

   - Automatically calculates the **Total Amount** of an order using the quantity and unit price of products.

2. **Stock Deduction Trigger**

   - Reduces inventory stock automatically whenever an order is placed, maintaining accurate stock levels.

3. **Loyalty Status Trigger**

   - Updates a customer's **Loyalty Status** based on their total purchases, supporting automated rewards and benefits.

   -

PROJECT EXPLANATION WITH REAL WORLD EXAMPLE

Let's follow the journey of a customer using the Salesforce CRM system:

1. **Customer Registration**

   - A customer, **Elijah Mikaelson**, visits the store or the online website.

   - In Salesforce, a **Customer record** is created containing his name, phone number, email, and other details.

   - **Validation Rule:** Ensures the email is in the correct format (e.g., must include **@gmail.com**).

2. **Product Setup**

   - The admin adds products, such as **Shirts** and **Jeans**, to the **Product__c** object.

   - Each product includes details like price, SKU, and description.

   - **Inventory records** are created to track stock levels for each product.

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

3. **Order Placement**

- Elijah decides to purchase **2 shirts** (₹2500 each).

- A new **Order record** is created in Salesforce.

- **Apex Trigger:** Automatically calculates the **Total Amount**.

    - Example calculation: 2 × ₹2500 = ₹5000

4. **Inventory Update**

- **As soon as the order is placed:**

    - **Inventory Trigger:** Reduces the stock of shirts by 2.

    - **Validation Rule:** Ensures stock cannot go below 0, preventing negative inventory.

5. **Loyalty Program**

- **Elijah's total purchase now amounts to ₹5000.**

- A **Customer Apex Trigger** evaluates total purchases and updates loyalty status based on thresholds:

    - < ₹500 → Bronze

    - ₹500–₹1000 → Silver

    - ₹1000 → Gold

- In this example, Elijah becomes a **Silver member**.

6. **Email Notifications**

- **When a new order is placed or loyalty status changes:**

    - **Flow + Email Alert** is triggered.

    - Elijah receives an email such as:
      "Thank you for your purchase! Your loyalty status is now Silver."

2ⁿᵈ Floor Administrative Building PUP Lopez Yumul St. Brgy. Burgos Lopez, Quezon

Phone: (Direct Lines) 042-3261256, 042-3025249; Telefax No: 042-8411890; Website: www.pup.edu.ph Email:lopez@pup.edu.ph

"THE COUNTRY'S 1ˢᵗ POLYTECHNIC U"

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
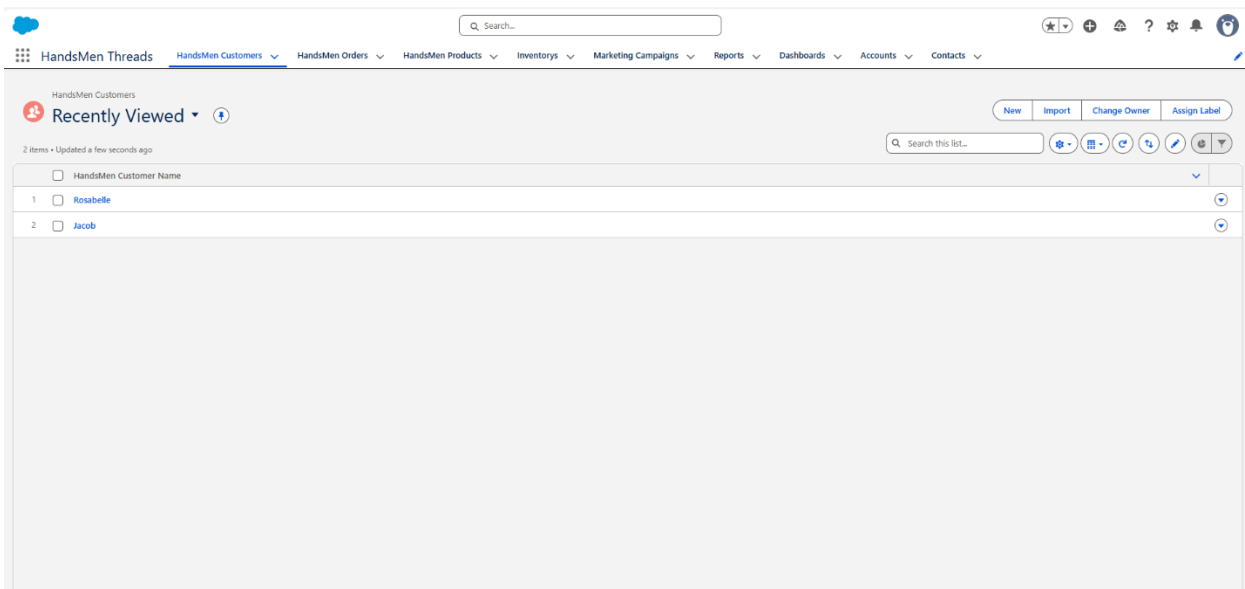Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

7. **Users and Roles**

- **Salesforce users are created for staff, with appropriate roles and profiles:**
  - **Niklaus Mikaelson** – Sales Role (**Platform 1** Profile)
  - **Kol Mikaelson** – Inventory Role (**Platform 1** Profile)

SCREENSHOTS

FIG: CUSTOM APP FOR HandsMen Threads

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

FIG: CUSTOMER CREATION IN HandsMen Threads

FIG: PRODUCTS IN HandsMen Threads

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

FIG: ORDER CONFIRMATION

FIG: ORDER CONFORMATION EMAIL

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

FIG: LOW STOCK ALERT EMAIL
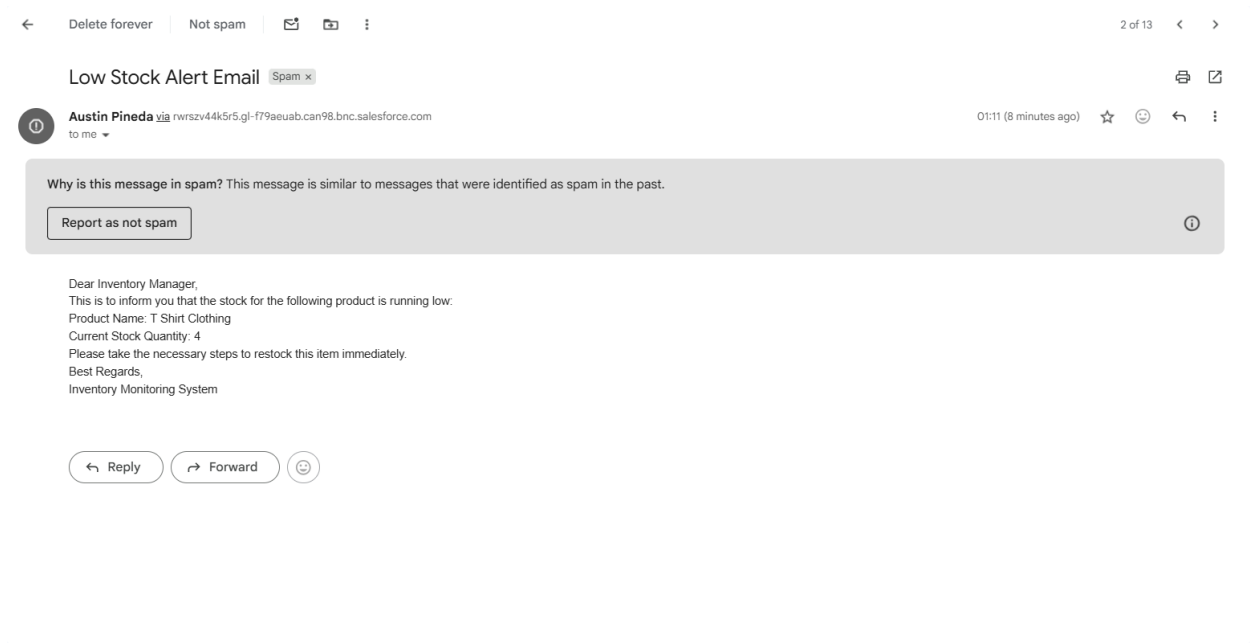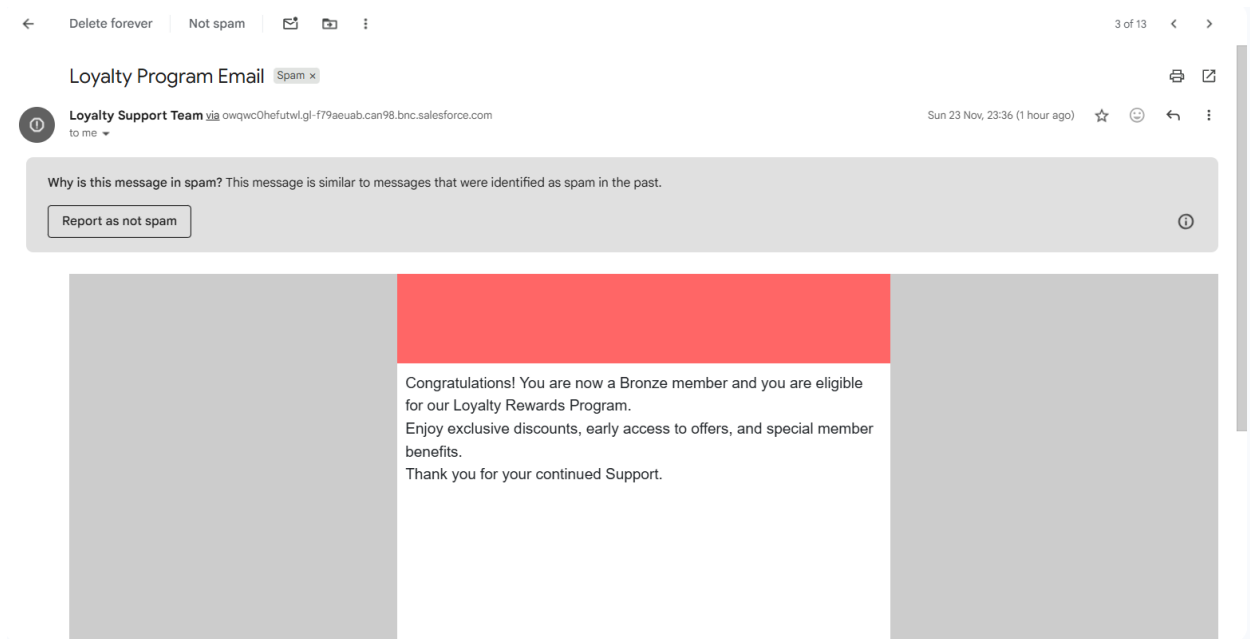

FIG: LOYALTY PROGRAM EMAIL

Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Branches and Satellite Campuses
LOPEZ QUEZON BRANCH
Bachelor of Science in Information Technology

CONCLUSION

The implementation of the customized Salesforce CRM for **HandsMen Threads** successfully streamlined business operations, improved data accuracy, and enhanced customer engagement. By creating centralized objects for Customers, Products, Orders, Inventory, and Marketing Campaigns, the system provides a structured and efficient way to manage key business processes. Automation through **Flows, Apex Triggers, and Email Alerts** has reduced manual work, ensured timely notifications, and maintained accurate stock and loyalty records. Role-based access and profiles secured data while enabling proper team collaboration. Overall, this CRM solution delivers a scalable and robust foundation to support the company's growth and improve overall customer experience.

FUTURE SCOPE

The Salesforce CRM system for HandsMen Threads can be further enhanced with the following improvements:

1. **Mobile Integration:** Enable mobile access so sales staff and managers can update orders, check inventory, and communicate with customers on the go.

2. **Advanced Analytics & Reporting:** Implement dashboards and AI-powered insights for sales trends, inventory forecasting, and customer behavior analysis.

3. **Integration with E-commerce Platforms:** Connect the CRM with online stores for real-time order management and inventory updates.

4. **Enhanced Loyalty Programs:** Incorporate tiered rewards, automated promotions, and personalized offers based on customer preferences.

5. **Chatbots & Customer Self-Service:** Provide automated customer support for inquiries, order tracking, and product recommendations.

6. **Marketing Automation:** Expand campaign management with targeted email campaigns, social media integration, and performance tracking.

These enhancements will allow HandsMen Threads to further optimize operations, drive customer satisfaction, and support scalable business growth.