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## Capstone Project

Salesforce Virtual Internship Program

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

Submitted By:

De Jesus, Jigo James C.

**BSIS 3AG2**

**November 2025**

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### ABSTRACT

My Salesforce capstone project, **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**, focuses on improving how the company manages its data and connects with customers. The project aims to build a strong data model that stores all important business information and keeps everything organized. By maintaining data integrity directly from the user interface, the system ensures that the information is always accurate and reliable. This makes it easier for the company to make better decisions and run operations smoothly.

To make the business workflow more efficient, I integrated several automated processes using Salesforce. Customers now receive automatic order confirmation emails to keep them informed and engaged. A dynamic loyalty program updates each customer's status based on their purchase history, encouraging repeat purchases. The system also sends proactive stock alerts when items run low and processes bulk order updates every midnight to keep financial and inventory records accurate. Overall, this project helps HandsMen Threads work smarter, improve customer service, and maintain reliable data for everyday operations.

### OBJECTIVE

- Automate Order Confirmations: Enable the system to send automatic email updates to customers after each order confirmation to improve engagement and strengthen customer relationships.
- Implement a Dynamic Loyalty Program: Automatically update customer loyalty status based on their purchase history to provide personalized rewards and encourage repeat transactions.
- Set Up Proactive Stock Alerts: Configure the system to send automatic notifications to the warehouse team when stock levels drop below five units, ensuring timely restocking and preventing shortages.
- Schedule Bulk Order Updates: Automate the daily processing of bulk orders at midnight to update financial records and adjust inventory levels for accurate and

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efficient operations.

## TECHNOLOGY DESCRIPTION

### Salesforce:

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses organize customer data, automate workflows, and enhance their sales, marketing, and service operations. It offers easy-to-use point-and-click tools and advanced features like Apex and Flows to create customized business solutions.

### Custom Objects:

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

#### **Example:**

- Customer\_c - Stores customer info
- Product\_c - Stores product details
- Order\_c - Stores orders

### Tabs:

Tabs are used to display object data in the Salesforce UI.

**Example:** A tab for **Product\_c** allows users to easily view and manage products.

### Profiles:

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

### Roles:

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

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## Permission Sets:

Permission Sets grant additional permissions to users without changing their profile.

## Validation Rules:

Validation Rules ensure data entered meets business criteria.

### **Example:**

- Email must contain @gmail.com
- Stock cannot be negative

## Email Templates:

Predefined formats for sending emails to customers or users.

### **Example:**

- "Order Confirmation" template

## Email Alerts:

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

### **Example:**

- When a loyalty level changes, an email is sent to the customer.

## Flows:

Flows automate business logic without code. They can create, update, or send notifications.

### **Example:**

- Flow triggers email alerts on new order

## Apex:

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

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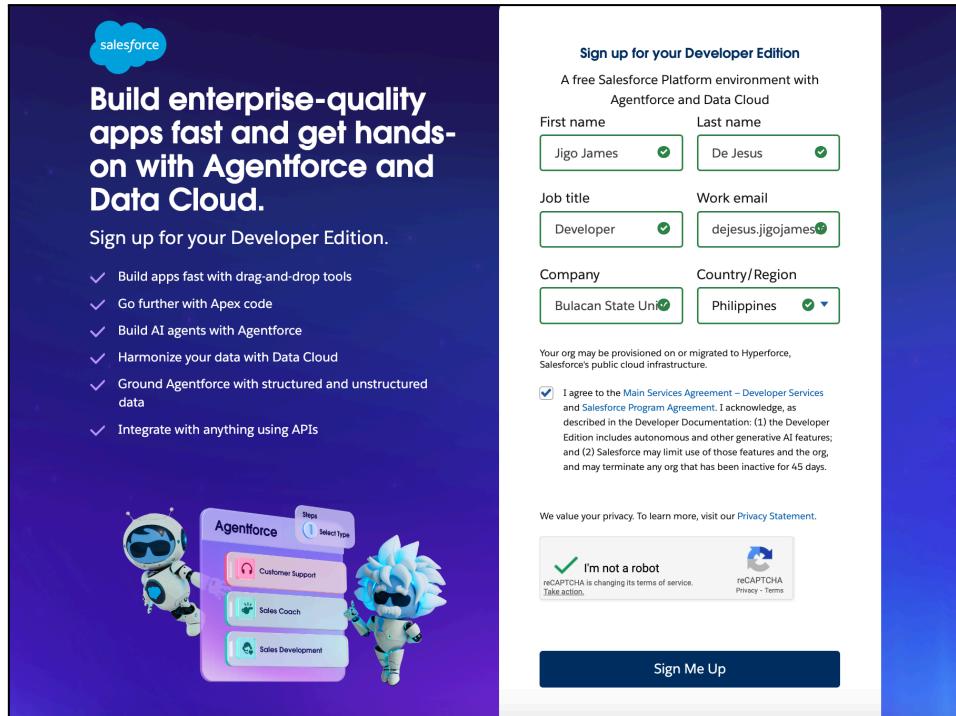
## Example:

- Update Total Amount c in orders
- Reduce inventory stock

## DETAILED EXECUTION OF PROJECT PHASES

### 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.



### 2. Custom Object Creation

Five custom objects were created to store business-critical data:

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- **HandsMen Customer** - Stores customer info like email, phone, loyalty status.
- **HandsMen Product** - Stores product catalog details like SKU, price, and stock.
- **HandsMen Order** - Stores orders placed by customers, including quantity and status.
- **Inventory** - Tracks stock quantity and warehouse location.
- **Marketing Campaign** - Stores promotional campaigns and scheduling.

Steps followed:

- Navigated to Setup → Object Manager → Create Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'HandsMen Order' is being created. The 'Details' tab is selected, showing the following configuration:

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name HandsMen_Order__c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label HandsMen Order
Field Sets	Plural Label HandsMen Orders
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	

Other tabs available include 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The 'Edit' and 'Delete' buttons are located at the top right of the main area.

### 3. Creating the Lighting App

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- A custom Lightning App named HandsMen Threads was developed.
- The app includes tabs such as HandsMen Customer, Order, Product, Inventory, Campaign, and Reports.
- The app is assigned to the System Administrator profile for full access and management.

#### **4. Validation Rules**

To ensure accurate data entry and enforce business logic, the following validation rules we applied:

- **Order Object** - Prevents saving if Total\_Amount\_c <= 0  
*Error: "Please Enter Correct Amount"*
- **Customer Object** - Validates email contains @gmail.com.  
*Error: "Please fill Correct Gmail"*

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New HandsMen Customer

\* = Required Information

Information

* HandsMen Customer Name	Jigo	Owner	Jigo James De Jesus
Email	dejesus.jigojames.bsis@bulsu.com		
Phone			
Loyalty Status	--None--		
FirstName	Jigo	∅ We hit a snag.	
LastName	DJ	Review the errors on this page.	
		• Please fill Correct Gmail	

## 5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 and added access to necessary custom objects.
- Created roles for different departments:
  - Sales Manager, Inventory Manager, Marketing Team

## 6. User Creation

Users were created in Salesforce and assigned the appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson - Assigned as Sales Role.
- Kol Mikaelson - Assigned as Inventory Role.

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- Daniel Mikaelson - Assigned as Marketing Role

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatty	chatty.00dd100000g3xjuaq.wpfdfxhceik@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	De Jesus, Jigo James	dej	dejesus.jigojames.bsis161@agentforce.com	System Administrator	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	EPIC, OrgFarm	OEPIC	epic.5946456b237c@orgfarm.salesforce.com	System Administrator	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	Mikaelson, Daniel	dmika	dejesus.jigojames.bsis5432@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	Mikaelson, Kol	kmtka	dejesus.jigojames.bsis6789@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	Mikaelson, Niklaus	nmika	dejesus.jigojames.bsis12345@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   Edit	User, Integration	integ	integration@00dd100000g3xjuaq.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User, Security	sec	insightssecurity@00dd100000g3xjuaq.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 7. Permission Sets

- Created a Permission Set named Permission\_Platform\_1 in Salesforce Setup.
- Configured object permissions to allow *Read*, *Create*, *Edit*, and *Delete* access for the HandsMen Customer and Order objects.
- Added user assignments by selecting a user with the Platform 1 profile.
- Successfully assigned the permission set to enable proper access control for designated users.

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The screenshot shows the Salesforce Setup interface. The top navigation bar includes icons for Cloud, Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is a breadcrumb trail: "IS302\_FinalProject... > Object Settings". The main content area is titled "Permission Sets" under the "SETUP" tab. A sub-section titled "Platform 1" is displayed, showing a table of object settings. The table has columns for "Object Name", "Object API Name", "Object Permissions", "Total Fields", and "Tab Settings". The objects listed include Accounts, Action Hub, Activation Definition, Activation Platform Activation Attributes, Activation Platform Audience Identifiers, Activation Platform Data Connector for S3, Activation Platform Fields, and Activation Platform Field Value Definitions. All objects have "No Access" permissions.

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	No Access	40	--
Action Hub	ActionHub	--	--	--
Activation Definition	MarketSegmentActivationDef	No Access	--	--
Activation Platform Activation Attributes	ActivationPlatformActvAttr	No Access	--	--
Activation Platform Audience Identifiers	ActvPlatformAdncldentifier	No Access	--	--
Activation Platform Data Connector for S3	ActvPfrmDataConnectorS3	No Access	--	--
Activation Platform Fields	ActivationPlatformField	No Access	--	--
Activation Platform Field Value Definitions	ActvTgtPlatFieldValDef	No Access	--	--

## 8. Email Templates & Alerts

Created three email templates:

- **Order Confirmation** - Sent on order status = Confirmed
- **Low Stock Alert** - Sent when Inventory < 5 units
- **Loyalty Program Email** - Sent when loyalty status changes

Corresponding Email Alerts were created using these templates and linked to automation flows.

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The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup modules like Setup Home, Salesforce Go, Service Setup Assistant, etc. Under the Email section, 'Classic Email Templates' is selected. In the main content area, a 'Classic Email Templates' page is displayed with a sub-section for 'Order Confirmation Email'. It shows the template details: Name is 'Order Confirmation Email', Unique Name is 'Order\_Confirmation\_Email', and it's available for use. Below this, the 'Email Template' section shows the subject 'Your Order has been Confirmed!' and the HTML preview content:

Subject: Your Order has been Confirmed!

HTML Preview:

Dear {!HandsMen\_Order\_\_c.HandsMen\_Customer\_\_c},  
Your order #{!HandsMen\_Order\_\_c.Name} has been confirmed!  
Thank you for shopping with us.  
Best Regards,

## **9. Flow Implementations**

### **A. Order Confirmation Flow**

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the customer.

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Flow Builder | order confirmation - V1 | Last saved on 11/5/2025, 02:16 PM (Active) | Run | Debug | View Tests | Save A...

```

graph TD
    Start((Record-Triggered Flow Start)) --> Run[Run Immediately]
    Run --> Order[order confirmation Action]
    Order --> End([End])
  
```

Jigo James De Jesus via 6h3nxxo... 2:17PM (6 hours ago) to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report not spam](#)

Dear ,  
Your order #O-0001 has been confirmed!  
Thank you for shopping with us.  
Best Regards,  
Sales Team

## B. Stock Alert Flow

- Triggered when an Inventory drops below 5.
- Sends Low Stock email to Inventory Manager.

Flow Builder | low stock alert - V1 | Last saved on 11/5/2025, 02:19 PM (Active) | Run | Debug | View Tests | Save A...

```

graph TD
    Start((Record-Triggered Flow Start)) --> Run[Run Immediately]
    Run --> Alert[low stock alert Email Alert]
    Alert --> End([End])
  
```

Object: Inventory Edit  
Trigger: A record is created or updated  
Conditions: 1  
Optimize for: Actions and Related Rec...  
Add Scheduled Paths (Optional)  
Open Flow Trigger Explorer for Inve...

Low Stock Alert Email Spam x

Jigo James De Jesus via mk86ns... 2:35PM (6 hours ago) to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report not spam](#)

Dear Inventory Manager,  
This is to inform you that the stock for the following product is running low:  
Product Name: T-shirt cloth  
Current Stock Quantity: 4  
Please take the necessary steps to restock this item immediately.  
Best Regards,  
Inventory Monitoring System

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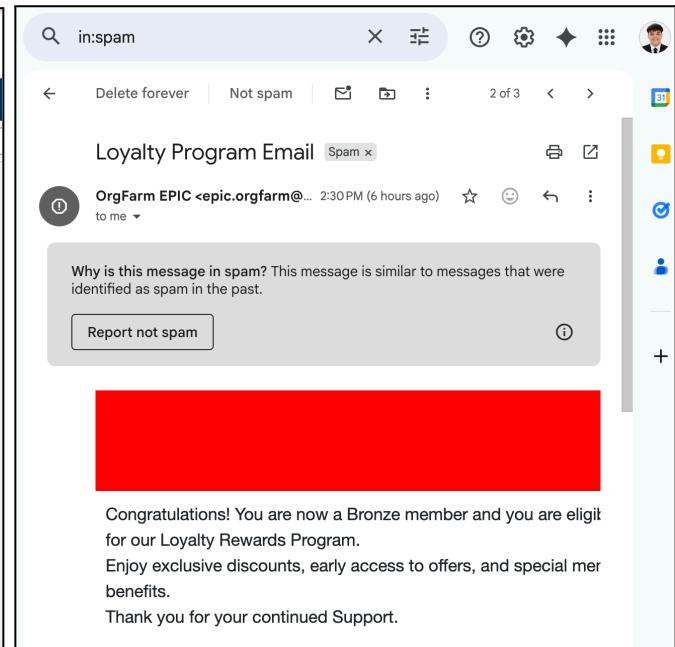
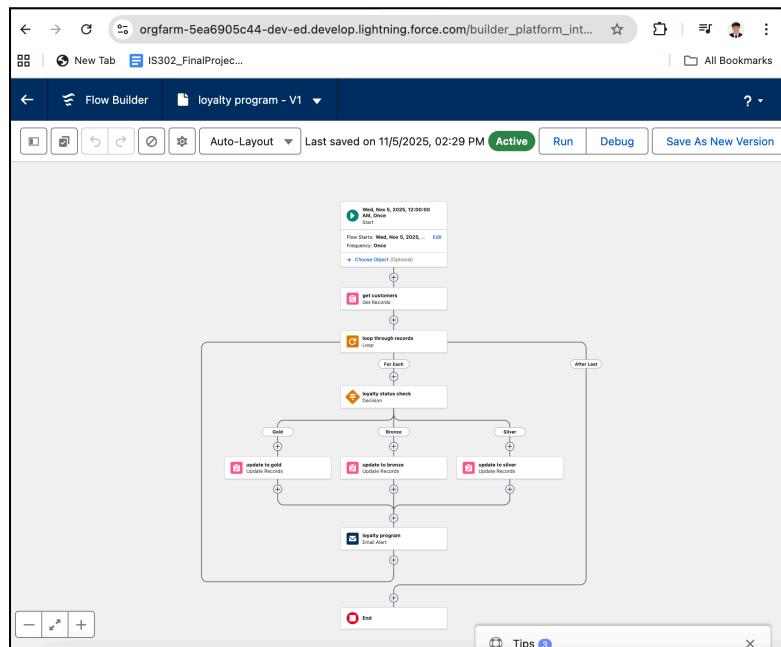
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## C. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



## 10. Apex Triggers

- **Order Total Trigger** - Auto-calculates Total Amount based on quantity and unit price.
- **Stock Deduction Trigger** - Reduces stock when an order is placed.
- **Loyalty Status Trigger** - Updates Loyalty Status based on total purchases.

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## PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's walk through it like a real customer interaction

### 1. Customer Registration

- A customer, Brad Pitt, visits the store's online catalog.
- In Salesforce: A record is created in the Customer object with her name, contact number, and email address.
- Validation Rule: Ensures the email format is correct (e.g., must contain "@gmail.com").

### 2. Product Setup

- The admin adds new items such as T-Shirts, Hoodies, and Sneakers into the Product\_c object.
- Each product includes a price, category, and description.
- An Inventory record is also created for each product to track available stock.

### 3. Order Placement

- Bradd decides to purchase 1 hoodie (₱1800) and 1 pair of sneakers (₱2200).
- In Salesforce: A new Order record is created under her profile.
- Apex Trigger: Automatically calculates Total\_Amount\_c = 1800 + 2200 = ₱4000.

### 4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces the stock of the hoodie and sneakers by 1 each.
- Validation Rule: Ensures the stock count never drops below zero.

### 5. Loyalty Program

- Bradd's total purchases now reach ₱4000.
- Trigger on Customer: Checks her cumulative purchase value and updates her loyalty tier:

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- Below ₱2500 → Bronze
- ₱2500–₱4999 → Silver
- ₱5000 and above → Gold
- Bradd's loyalty level is now Silver.

### 6. Email Notifications

- Whenever a new order is placed or a loyalty status changes:
- A Flow + Email Alert is triggered automatically.
- Bradd receives an email saying: "Thank you for your purchase! Your current loyalty status is Silver."

### 7. Users and Roles

Salesforce users with assigned roles manage different business areas:

- Vic Sotto – Sales Role (Platform 1 Profile)
- Joey De Leon – Inventory Role (Platform 1 Profile)
- Tito Sen – Marketing Role (Platform 1 Profile)

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## SCREENSHOTS

The screenshot shows a custom Salesforce application interface. At the top, there's a navigation bar with tabs: 'HandsMen Threads' (selected), 'HandsMen Customers' (highlighted in blue), 'HandsMen Orders', 'HandsMen Products', and 'More'. Below the tabs is a search bar labeled 'Search...'. Underneath the search bar, there's a section titled 'Recently Viewed' with a red circular icon containing a person symbol. It shows '1 item • Updated an hour ago'. To the right of this are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below this, there's a search bar with the placeholder 'Search this list...' and a set of filter icons. A table below lists one customer: 'John' with a checked checkbox next to it. The table has columns for a checkbox, the customer name, and a dropdown menu.

Figure 1. Custom App for Handsmen Threads

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The screenshot shows a customer record for 'John' in the 'HandsMen Customers' section. The 'Details' tab is selected. The contact information includes:

HandsMen Customer Name	Owner
John	Jigo James De Jesus
Email	dejesus.jigojames.bsis@gmail.com
Phone	
Loyalty Status	Bronze
FirstName	John
LastName	M
FullName	John M
Total Purchases	500
Created By	Jigo James De Jesus, 11/4/2025, 9:25 PM
Last Modified By	OrgFarm EPIC, 11/5/2025, 12:00 AM

Figure 2. Customer Creation in HandsMen Threads

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The screenshot shows a web-based application interface for managing products. At the top, there's a navigation bar with tabs: 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products' (which is currently selected), and 'Inventory'. Below the navigation is a search bar and several action buttons: 'New', 'Import', 'Change Owner', and 'Assign Label'. A 'Recently Viewed' section shows a single item: 'T-shirt cloth'. There's also a 'Search this list...' input field and a set of filter and sort icons.

*Figure 3. Products in HandsMen Threads*

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The screenshot shows a Salesforce Lightning interface for a sales order. The top navigation bar includes tabs for 'HandsMen Customers', 'HandsMen Orders' (which is active), and 'HandsMen Products'. Below the navigation is a search bar and a toolbar with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area displays the details of an order:

Field	Value
HandsMen OrderNumber	O-0001
Owner	Jigo James De Jesus
HandsMen Product	T-shirt cloth
HandsMen Customer	John
Status	Confirmed
Quantity	400
Total Amount	1,200
Customer Email	dejesus.jigojames.bsis@gmail.com
Created By	Jigo James De Jesus, 11/4/2025, 9:28 PM
Last Modified By	Jigo James De Jesus, 11/4/2025, 10:41 PM

Figure 4. Order Confirmation

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The screenshot shows a Salesforce Lightning component for managing inventory. At the top, there's a navigation bar with tabs for 'Inventory', 'New Contact', 'Edit', and 'New Opportunity'. Below the navigation, the inventory number 'I-0001' is displayed. The main area contains several input fields grouped under 'Details':

- Inventory Number: I-0001
- HandsMen Product: T-shirt cloth
- Stock Quantity: 600
- Stock Status: Available
- Warehouse:
- Created By: Jigo James De Jesus, 11/4/2025, 9:26 PM
- Last Modified By: Jigo James De Jesus, 11/4/2025, 10:41 PM

*Figure 5. Inventory Status*

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The screenshot shows a Gmail inbox with a search bar at the top containing "in:spam". There are three messages listed:

- Your Order has been Confirmed!** (Spam) - Sent by Jigo James De Jesus via 6h3nxxoyzwhc.dl-g3xjuaq.... at 2:17 PM (6 hours ago). The message content is partially redacted.
- Why is this message in spam?** This message is similar to messages that were identified as spam in the past.
- Report not spam**

The left sidebar shows the navigation menu: Compose, Inbox (161), Starred, Snoozed, Sent, Drafts (4), Purchases (2), Less, Important, Scheduled, All Mail, Spam (selected), Trash, Manage subscriptions, Manage labels, Create new label, Labels, and Upgrade.

**Figure 6. Confirmation Letter Email**



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The screenshot shows a Gmail inbox with the search term "in:spam" applied. There are three messages listed, with the first one being a low stock alert. The message is from "Jigo James De Jesus" and is marked as spam. The subject is "Low Stock Alert Email". The message body contains the following text:

Dear Inventory Manager,  
This is to inform you that the stock for the following product is running low:  
Product Name: T-shirt cloth  
Current Stock Quantity: 4  
Please take the necessary steps to restock this item immediately.  
Best Regards,  
Inventory Monitoring System

At the bottom of the email, there are buttons for "Reply", "Forward", and a smiley face icon.

Figure 7. Low Stock Alert Email

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The screenshot shows a Gmail inbox with a search bar at the top containing "in:spam". A single email message is visible, which has been flagged as spam. The message is from "OrgFarm EPIC <epic.orgfarm@salesforce.com>" and was sent at 2:30 PM (6 hours ago) to the user. The subject of the email is "Loyalty Program Email". A tooltip on the message indicates it was identified as spam because it was similar to messages that were identified as spam in the past. Below the message, there is a redacted body area followed by a snippet of the original message content:

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.  
Enjoy exclusive discounts, early access to offers, and special member benefits.  
Thank you for your continued Support.

**Figure 7. Loyalty Program Email**



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## CONCLUSION

The HandsMen Threads Salesforce Capstone Project successfully demonstrated how CRM automation can transform business operations in the fashion retail industry. By integrating custom objects, validation rules, Apex triggers, and automated workflows, the system now streamlines data management, improves order processing, and enhances customer engagement. The automation of loyalty programs, stock alerts, and email notifications helps ensure that every business process runs efficiently with minimal manual effort. Overall, this project not only strengthens HandsMen Threads' operational foundation but also provides a scalable model for other small to medium enterprises seeking digital transformation through Salesforce.

## FUTURE SCOPE

In the future, the system can be expanded by integrating Salesforce Service Cloud to manage customer inquiries and after-sales support efficiently. The addition of AI-driven analytics using Einstein Analytics could help predict customer behavior and optimize marketing campaigns. Furthermore, connecting the platform with e-commerce systems and payment gateways would allow real-time synchronization of online orders and transactions. These enhancements will make HandsMen Threads a fully automated, data-driven, and customer-centric enterprise, capable of adapting to the evolving demands of the fashion industry.

In the long term, implementing mobile access through Salesforce's mobile app can empower store staff to view orders, update inventory, and check customer details on the go. The introduction of dashboards and real-time reporting will help management make data-driven decisions and track sales performance effectively. Finally, enhancing security and role-based access will ensure that sensitive business and customer information remains protected as the organization continues to grow.

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