

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

**Angeles, Robert John M.**

**BSIT221A**

## **Project Overview**

“HandsMen Threads” is a Salesforce-based Customer Relationship Management (CRM) system developed for a men’s fashion retail brand that focuses on personalized service, customer engagement, and streamlined sales processes.

The system automates core business functions such as lead management, customer profiling, order tracking, and loyalty rewards to provide a seamless experience from product inquiry to post-purchase follow-up.

This CRM aims to strengthen customer relationships, improve marketing precision, and ensure data-driven decisions that support business growth in the fashion retail industry.

## **Objectives**

- To automate sales and customer service processes for HandsMen Threads.
- To provide a centralized database for tracking leads, customers, and sales opportunities.
- To enhance the customer experience by offering personalized recommendations and loyalty programs.
- To streamline backend operations such as order monitoring, inventory alerts, and follow-up automation.
- To generate analytical reports and dashboards for business insights and forecasting.

## **Business Value:**

By implementing Salesforce CRM, HandsMen Threads improves operational efficiency, enables personalized marketing campaigns, and builds stronger relationships with premium clients aligning technology with the brand’s vision of sophistication.

## Phase 1 – Requirement Analysis & Planning

### Include these points:

- **Understanding Business Requirements:**

HandsMen Threads needed a centralized system to handle client data, automate customer interactions, manage leads, and monitor sales performance. Pain points included manual record-keeping, delayed follow-ups, and lack of customer behavior analytics.

- **Defining Project Scope & Objectives:**

The CRM covers customer registration, purchase tracking, appointment scheduling, inventory status, and loyalty reward management.

- **Design Data Model and Security Model:**

Custom objects for Customers, Orders, Products and Appointments with defined relationships and field-level security.

- **Stakeholders Mapping:**

- **CEO/Owner** – manages system configurations and data access
- **Inventory** – handles all the products
- **Marketing** – handles customer profiles, leads, and transactions
- **Sales** – handles all the sales from the products
- **Customers** – indirectly interact through marketing automations and updates

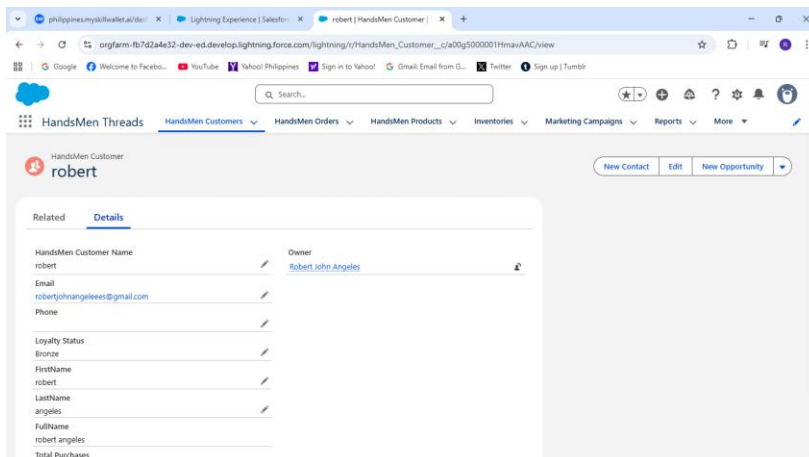
- **Execution Roadmap:**

Planning → Salesforce Setup → Object Customization → Automation → Testing → Deployment.

## Phase 2 – Salesforce Development (Backend & Configurations)

### Include:

- **Environment setup (Developer Org or Sandbox).**



- **Custom Objects: *Customer, Orders, Products, Inventory, Marketing Campaign.***

Setup > OBJECT MANAGER

### HandsMen Customer

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
FirstName	FirstName_c	Text(255)		
FullName	FullName_c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName_c	Text(255)		

Setup > OBJECT MANAGER

### HandsMen Order

Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email_c	Email		
HandsMen Customer	HandsMen_Customer_c	Lookup(HandsMen Customer)		✓
HandsMen OrderNumber	Name	Auto Number		✓
HandsMen Product	HandsMen_Product_c	Lookup(HandsMen Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓

Setup > OBJECT MANAGER

### HandsMen Product

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order_c	Lookup(HandsMen Order)		✓
Owner	OwnerId	Lookup(User.Group)		✓
Price	Price_c	Currency(16, 0)		
SKU	SKU_c	Text(255)		

phillippines.myskillwallet.ai/doi Lightning Experience | Salesforce Inventory | Salesforce robert | HandsMen Customer

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011g5000000B5F/FieldsAndRelationships/view

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Setup Home Object Manager

SETUP > OBJECT MANAGER

### Inventory

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)		✓
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		

phillippines.myskillwallet.ai/doi Lightning Experience | Salesforce Marketing Campaign | Salesforce robert | HandsMen Customer

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011g5000000B5F/FieldsAndRelationships/view

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SETUP > OBJECT MANAGER

### Marketing Campaign

Details

**Fields & Relationships**  
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User Group)		✓
Start Date	Start_Date__c	Date		

## • Validation Rules

phillippines.myskillwallet.ai/doi Lightning Experience | Salesforce HandsMen Customer | Salesforce robert | HandsMen Customer

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011g5000000B5F/ValidationRules/view

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SETUP > OBJECT MANAGER

### HandsMen Customer

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

**Validation Rules**

Conditional Field Formatting

**Validation Rules**  
1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Robert John Angeles, 10/23/2023, 7:22 PM

Validation Rules

1 Item, Sorted by Rule Name

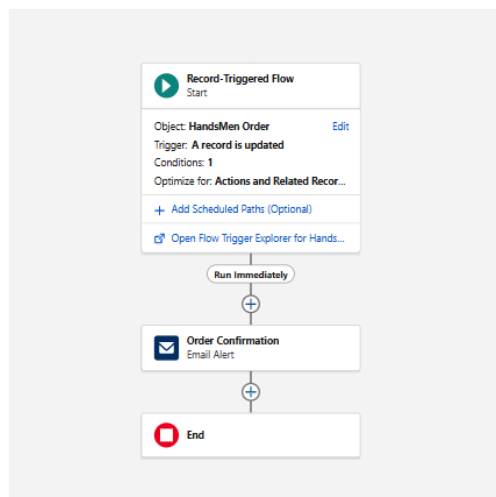
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Robert John Angeles, 10/23/2023, 7:11 PM

Validation Rules

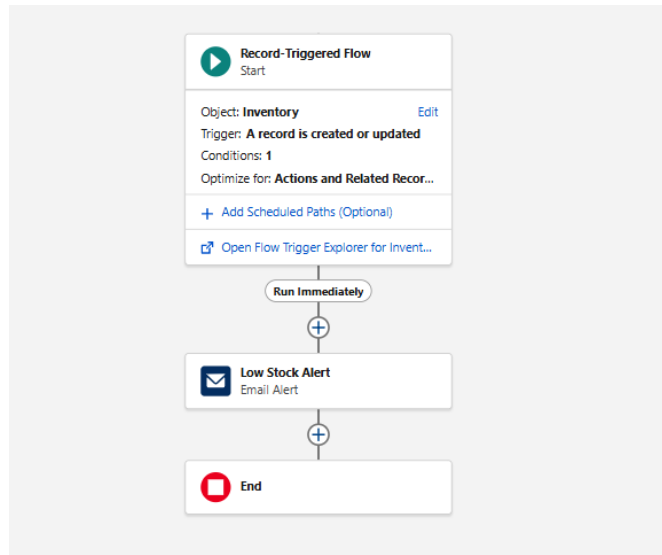
1 Item, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Stock_Quantity	Top of Page	the inventory count is never less than zero.	✓	Robert John Angeles, 10/23/2023, 7:18 PM

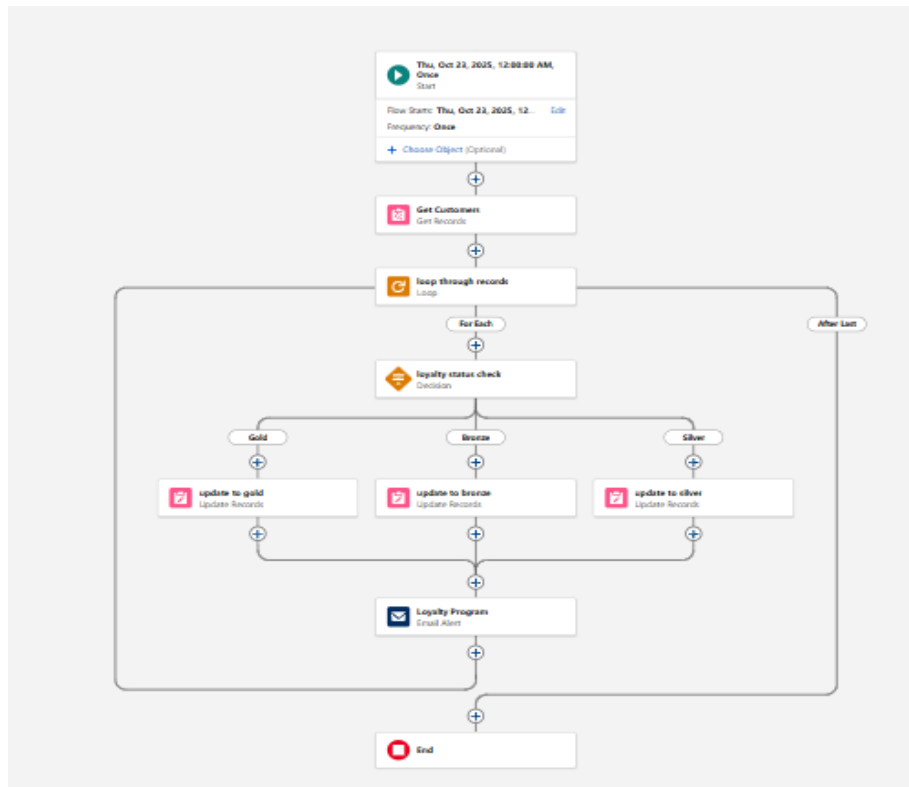
- **Flows:**
  - **Order Confirmation**



## - Low Stock Alert



## - Loyalty Program



- Apex Classes / Triggers: Used to update stock automatically after purchase.

```

1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12    );
13
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && !productMap.containsKey(order.HandsMen_Product__c)) {

```

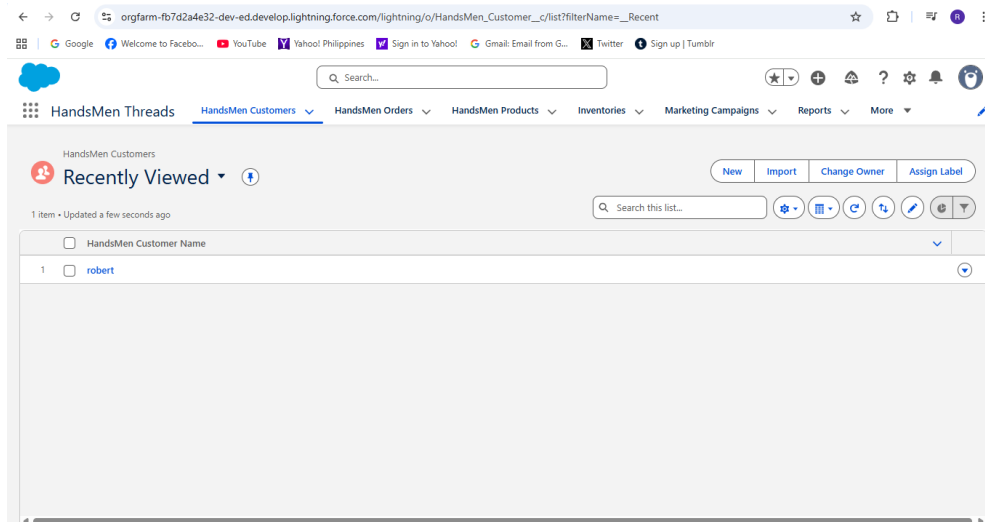
```

1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c

```

## Phase 3 – UI/UX Development & Customization

- Lightning App created as “HandsMen Threads CRM.”



- **Page Layouts and Dynamic Forms**

The screenshot shows the 'HandsMen Customer' profile for 'robert'. The page has a top navigation bar with a search bar and various icons. Below the navigation bar, there's a sub-header with 'HandsMen Threads' and a dropdown menu for 'HandsMen Customers'. The main content area displays the customer's details in a form-like layout. On the right, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'. At the bottom, it shows 'Created By' and 'Last Modified By' information.

Field	Value	Action
HandsMen Customer Name	robert	Edit
Owner	Robert John Angeles	Info
Email	robertjohnangelees@gmail.com	Edit
Phone		Edit
Loyalty Status	Bronze	Edit
FirstName	robert	Edit
LastName	angeles	Edit
FullName	robert angeles	
Total Purchases	500	Edit

Created By: Robert John Angeles, 10/23/2025, 7:25 PM  
Last Modified By: Robert John Angeles, 10/23/2025, 10:04 PM

The screenshot shows a 'HandsMen Order' form overlay. The form is titled 'HandsMen OrderNumber' and 'Owner: Robert John Angeles'. It contains several fields for order details. The background shows a 'Recently Viewed' list of orders.

Field	Value	Action
Status	Pending	Refresh
Quantity	500	Refresh
Total Amount		
* Customer Email	robertangelees@gmail.com	Refresh
HandsMen Product	T-shirt cloth	Remove
HandsMen Customer	robert	Remove

Buttons: Cancel, Save & New, Save



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Search...

Star

Plus

Cloud

Question

Settings

Notifications

User

HandsMen Product

Tuxedo

New Contact

Edit

New Opportunity

Related

Details

HandsMen Product Name

Tuxedo

Owner

Robert John Angeles

SKU

Price

Stock Quantity

1,000

Created By

Robert John Angeles

10/23/2025, 11:30 PM

Last Modified By

Robert John Angeles

10/23/2025, 11:30 PM

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Search...

Star

Plus

Cloud

Question

Settings

Notifications

User

New Inventory

Information

\* = Required Information

Inventory Number

\* Product

Search HandsMen Products...

Complete this field.

Stock Quantity

Warehouse

HandsMen Product

Search HandsMen Products...

Cancel

Save & New

Save

Recently Viewed

3 items • Updated a few seconds ago

Inventory Number

1

2

3

1 -0003

1 -0002

1 -0001

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

Search...

Star

Plus

Cloud

Question

Settings

Notifications

User

Inventory

I -0003

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I -0003

Product

Tuxedo

Stock Quantity

1,000

Stock Status

Available

Warehouse

HandsMen Product

Tuxedo

Created By

Robert John Angeles

10/23/2025, 11:31 PM

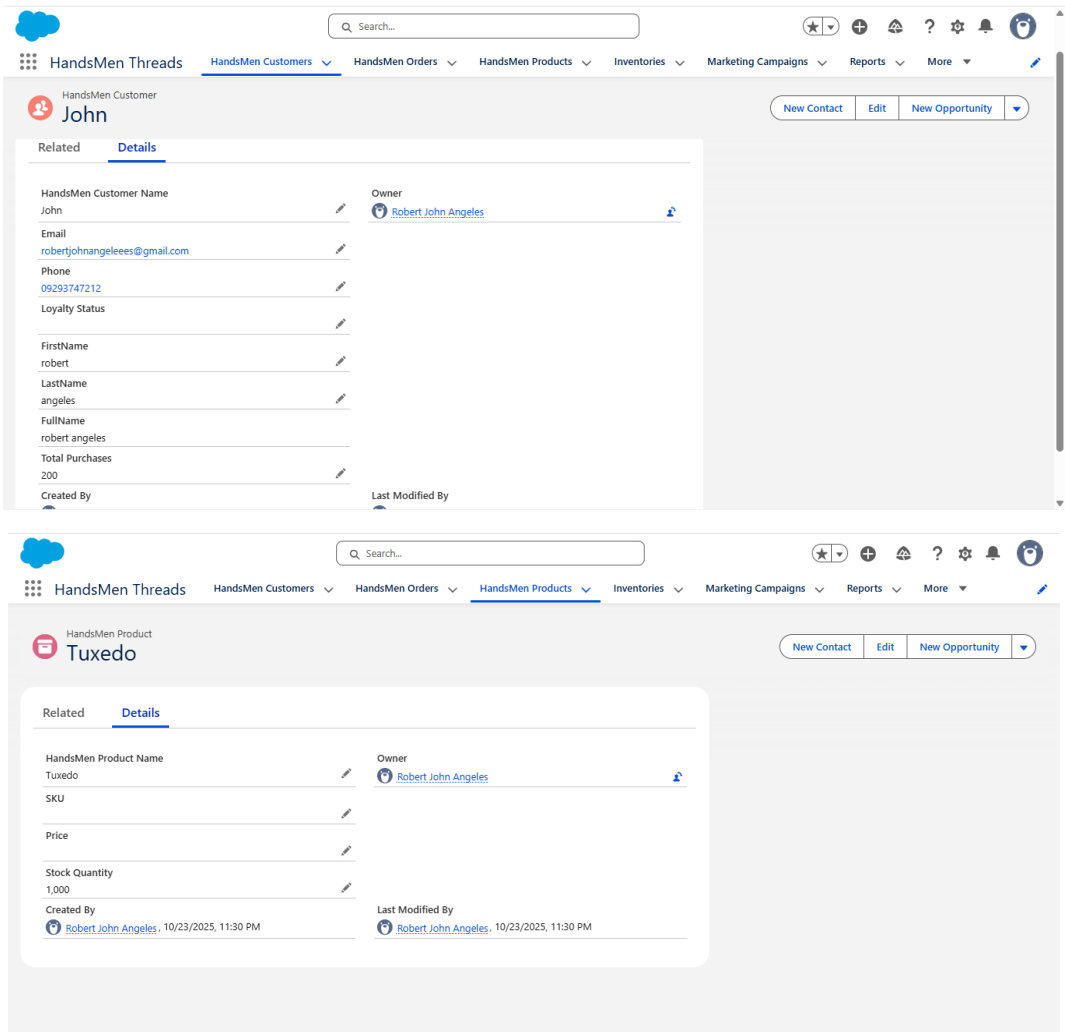
Last Modified By

Robert John Angeles

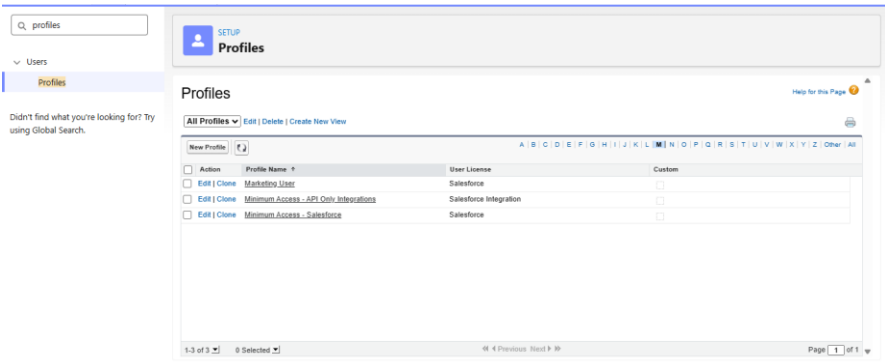
10/23/2025, 11:31 PM

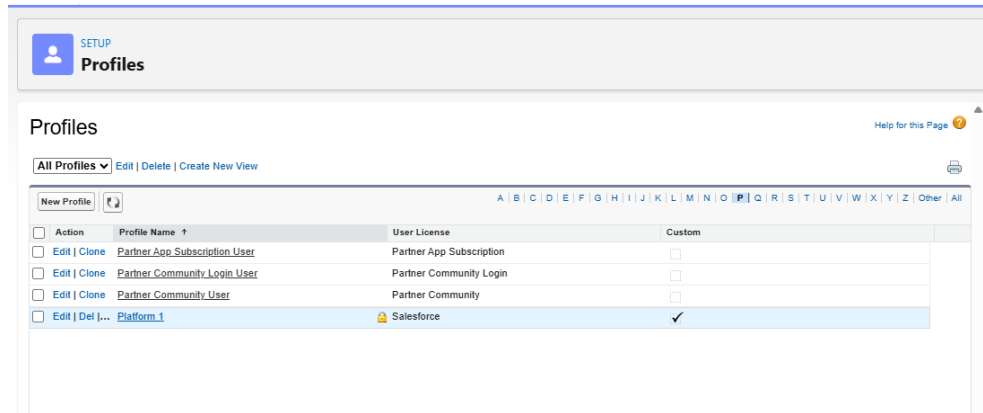
## Phase 4 – Data Migration, Testing & Security

- Data imported

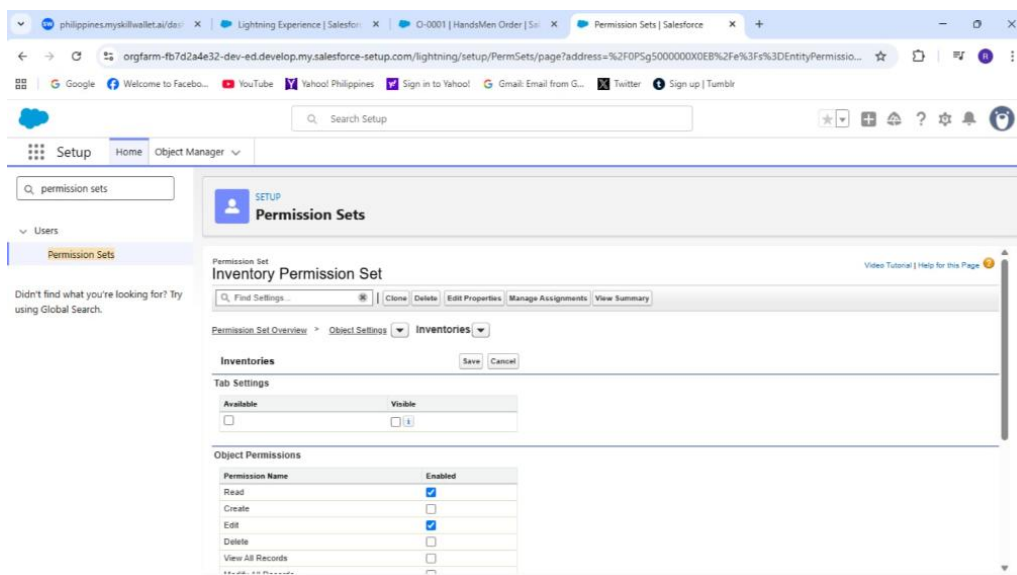
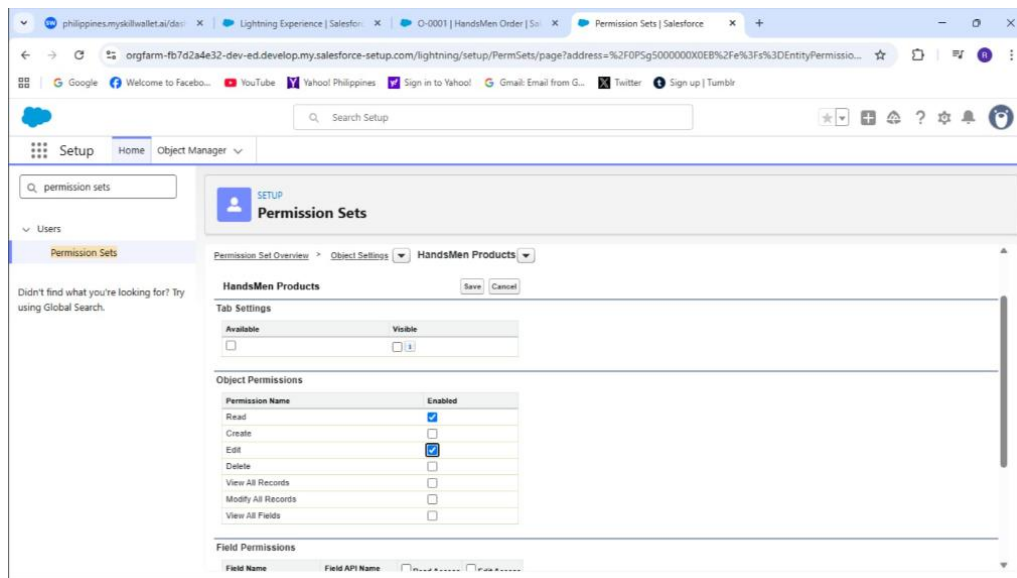


- Profiles, Roles, Permission Sets to manage visibility of customer financial data.





## Permission Sets



philippines.myskillwallet.ai/... Lightning Experience | Salesforce | O-0001 | HandsMen Order | Setup | Permission Sets | Salesforce

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/page?address=%2F0Psg5000000X3dd%2Ffe%3Fs%3DEntityPermissio...

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Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP  
Permission Sets

Permission Set Overview > Object Settings > HandsMen Customers

Marketing Permission Sets

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

HandsMen Customers Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

philippines.myskillwallet.ai/... Lightning Experience | Salesforce | O-0001 | HandsMen Order | Setup | Permission Sets | Salesforce

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/page?address=%2F0Psg5000000X3dd%2Ffe%3Fs%3DEntityPermissio...

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Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP  
Permission Sets

Permission Set Overview > Object Settings > Marketing Campaigns

Marketing Campaigns Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
------------	----------------	-------------	-------------

philippines.myskillwallet.ai/da... Lightning Experience | Salesforce | O-0001 | HandsMen Order | S... Permission Sets | Salesforce

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/page?address=%2F0Psg5000000XEIX%2Fe%3F%3DEntityPermission...

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Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set Overview Object Settings HandsMen Customers

Save Cancel

HandsMen Customers

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Field Permissions

philippines.myskillwallet.ai/da... Lightning Experience | Salesforce | O-0001 | HandsMen Order | S... Permission Sets | Salesforce

orgfarm-fb7d2a4e32-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/page?address=%2F0Psg5000000XEIX%2Fe%3F%3DEntityPermission...

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Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

Permission Set Overview Object Settings HandsMen Orders

Save Cancel

HandsMen Orders

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

- Test Classes for Apex and Flows.

```
1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c> (
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]);
```

User	Application	Operation	Time	Status	Read	Size
Robert John Angeles	Unknown	ApexTestHandler	10/24/2025, 2:49:23 PM	Success	Unread	2.22 KB
Robert John Angeles	Unknown	ApexTestHandler	10/24/2025, 2:49:23 PM	Success	Unread	525 bytes

```
1 global class InventoryBatchJob implements Database.Batchable<Object>, 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    global void execute(Database.BatchableContext BC, List<Object> records) {
13
14        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c> ();
15
16        for (HandsMen_Product__c product : (List<HandsMen_Product__c>) records) {
17            // Logic to update products
18        }
19    }
20 }
```

User	Application	Operation	Time	Status	Read	Size
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:12 PM	Success	Unread	535 bytes
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:11 PM	Success	Unread	535 bytes
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:11 PM	Success	Unread	535 bytes
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:11 PM	Success	Unread	538 bytes
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:10 PM	Success	Unread	538 bytes
Robert John Angeles	Browser	/udd/PermissionSet/viewPermissi...	10/24/2025, 2:42:10 PM	Success	Unread	535 bytes

- Order creation

The screenshot shows a mobile application interface for 'HandsMen Threads'. A modal form is open for creating a new order. The form fields are as follows:

- Status:** A dropdown menu with 'Pending' selected.
- Quantity:** A text input field containing the value '400'.
- Total Amount:** An empty text input field.
- \* Customer Email:** A text input field containing 'robertjohnangelees@gmail.com'.
- HandsMen Product:** A dropdown menu with 'T-shirt cloth' selected.
- HandsMen Customer:** A dropdown menu with 'John' selected.

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

- **Approval process**

The screenshot shows the 'HandsMen Order' details for order O-0008. The order is owned by Robert John Angeles. The status is 'Pending'. The customer email is 'robertjohnangelees@gmail.com'. The product is 'T-shirt cloth'. The customer is 'John'.

The status dropdown menu is open, showing the following options:

- None--
- ✓ Pending
- Confirmed
- Rejection

At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

- **Loyalty points automation**

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

HandsMen Customer

John

New ContactEditNew Opportunity

Phone

09293747212

Loyalty Status

Bronze

--None--

Gold

Silver

Bronze

FullName

robert angeles

This field is calculated upon save

Total Purchases

200

Created By

Robert John Angeles, 10/23/2025, 11:34 PM

Cancel

Save

Last Modified By

John Angeles, 10/23/2025, 11:34 PM

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

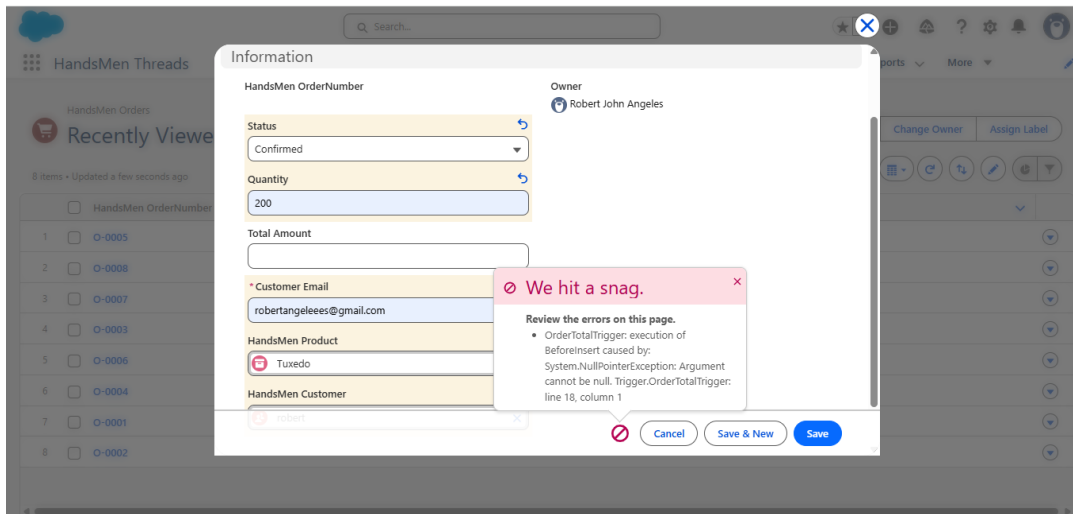
Report as not spam



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.

- Error validations





## Conclusion

The Salesforce CRM implementation for HandsMen Threads became an important step in modernizing how the brand manages its customers and daily operations. Through this project, the team was able to automate key business processes such as lead management, order tracking, and loyalty rewards. These improvements helped reduce manual work and errors while giving staff more time to focus on customer service and personalized experiences.

The CRM system also made it easier for the business to view and manage all its data in one place. Managers can now track sales performance, customer preferences, and product trends through reports and dashboards. Having these tools available allows them to make faster and smarter decisions that support both sales and marketing strategies. Overall, the project greatly improved efficiency, communication, and customer satisfaction within the company.

Another important result of this project is its potential for future development. The Salesforce platform gives HandsMen Threads room to grow by allowing new features like AI-based recommendations, chatbots for customer support, or advanced analytics that can help predict fashion trends. These additions can make the system even more helpful and interactive for both the staff and the customers.

In conclusion, the HandsMen Threads Salesforce CRM project shows how technology can support a brand's mission to provide quality service and sophistication in men's fashion. The system not only enhances the business workflow but also builds stronger relationships with customers. This capstone project has been a valuable experience that demonstrates how digital transformation can bring long-term benefits to a modern retail business.