

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

**by**

**Jan Jan Mañibo Garcia**

**BSIT 4-1**

**Polytechnic University of the Philippines  
Bansud Campus**

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

## **Project Overview**

The HandsMen Threads Salesforce CRM project is developed to centralize all essential business operations, including customer management, product tracking, order processing, inventory monitoring, and marketing coordination. This system ensures smooth and organized workflow by connecting key business modules into a single CRM platform. It improves overall business efficiency by supporting accurate data management, quick decision-making, and seamless coordination among different departments such as Sales, Inventory, and Marketing.

## **Objectives**

The main objective of the HandsMen Threads CRM project is to build a scalable and structured Salesforce application that will enhance customer interaction, streamline order processing, automate essential business operations, and maintain accurate inventory tracking. This CRM aims to support business teams through secure access, optimized workflows, and proper data handling. By using structured object relationships, validation rules, and automation, the system will help HandsMen Threads achieve improved operational efficiency and customer satisfaction.

## **Phase 1: Requirement Analysis & Planning**

### **Understanding Business Requirements**

- Manage customer information including contact details, email, phone number, and loyalty status.
- Track product details, stock levels, SKU codes, pricing, and inventory availability.
- Process and manage customer orders with accurate order amounts and product selection.
- Organize marketing campaigns and associate them with customers.
- Implement secure and role-based access for Sales, Inventory, and Marketing users.

## Defining Project Scope and Objectives

- Create five essential custom objects: Customer, Product, Order, Inventory, and Marketing Campaign.
- Build object relationships to ensure accurate and connected data flow.
- Implement validation rules for accurate inputs and data integrity.
- Configure security using profiles, roles, and permission sets.
- Prepare email templates for communication and notification processes.

## Design Data Model and Security Model

- Lookup and Master-Detail relationships between Customers → Orders → Products.
- Master-Detail relationship between Product and Inventory for stock tracking.
- Use profiles, roles, and permission sets for access control.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The page title is 'Permission Sets'. It displays a list of existing permission sets, each with a checkbox, name, description, and license information. The list includes various legacy Data Cloud permission sets and Agentforce-related permission sets like 'Access Agentforce Default Agent' and 'Agentforce Service Agent Configuration'. The interface includes standard Salesforce navigation elements like a search bar, a help icon, and a sidebar with links for 'Users' and 'Permission Sets'.

Action	Permission Set Name	Description	License
<input type="checkbox"/>	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce adm ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	ActorCASCPermSet	Allow access to agent platform.	Cloud Integration User
<input type="checkbox"/>	Agent Platform Builder	Allows users to build and manage in-org copilots.	Agentforce (Default)
<input type="checkbox"/>	Agentforce Default Admin	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Agentforce Service Agent Configuration	Access knowledge articles and manage cases and contacts as an auto ...	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce Service Agent Object Access	Set up and use Agentforce Service Agent actions with enhanced data s ...	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce Service Agent Secure Base		

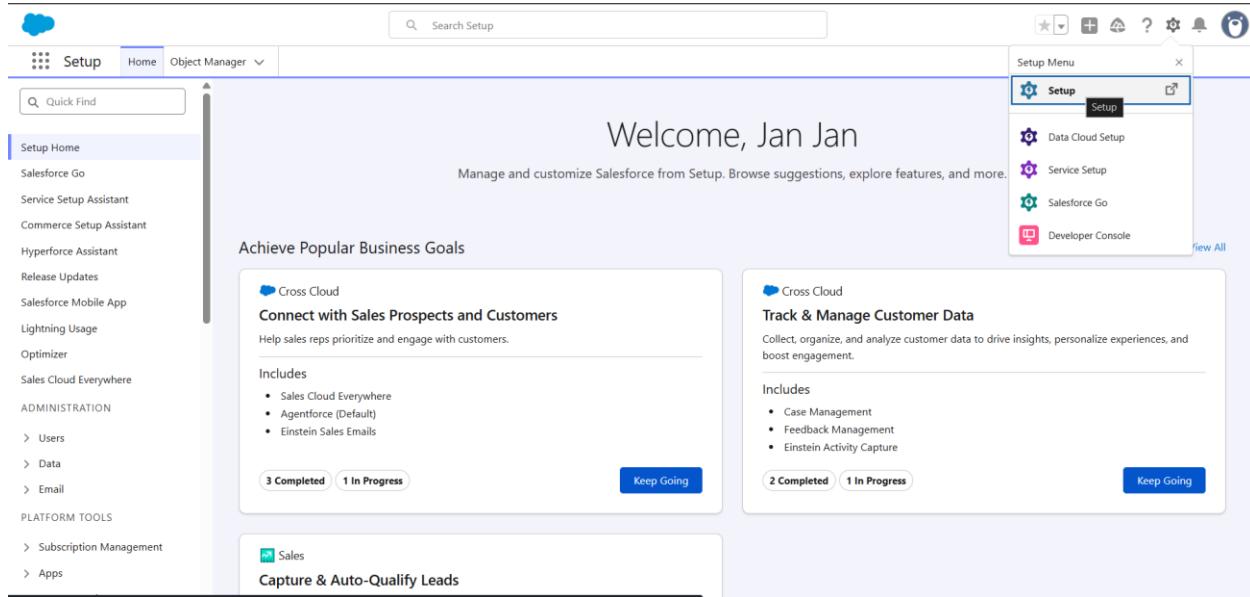
## Stakeholder Mapping

- **CEO** – Oversees overall operations.
- **Sales Team** – Manages customers and orders.
- **Inventory Team** – Manages product information and stock.
- **Marketing Team** – Manages campaigns and customer engagement.

## Execution RoadMap

- Environment Setup

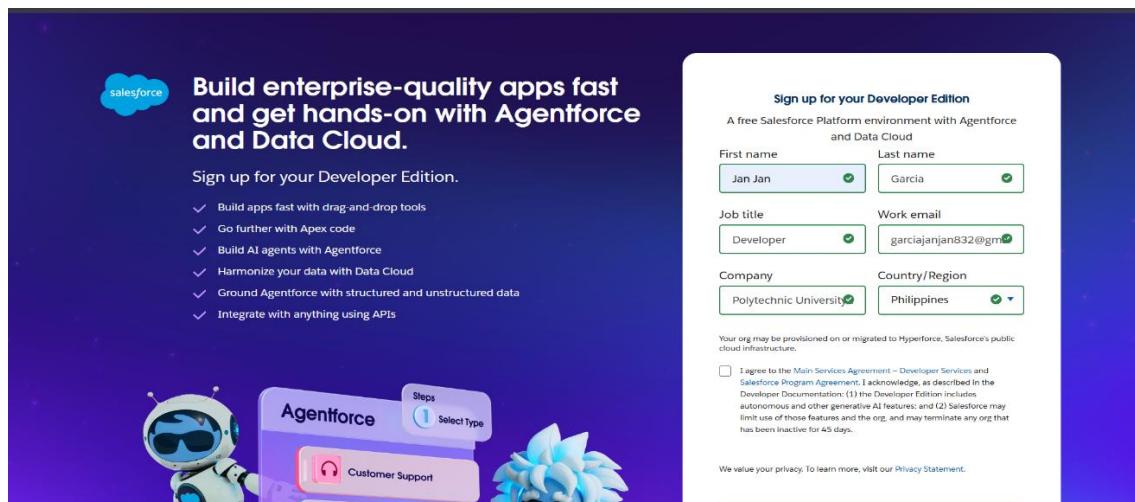
- Object & Field Creation
- App & UI Configuration
- Security Setup
- Validation Rules & Automation
- Testing & Deployment



## Phase 2: Salesforce Development – Backend & Configurations

### Setup Environment

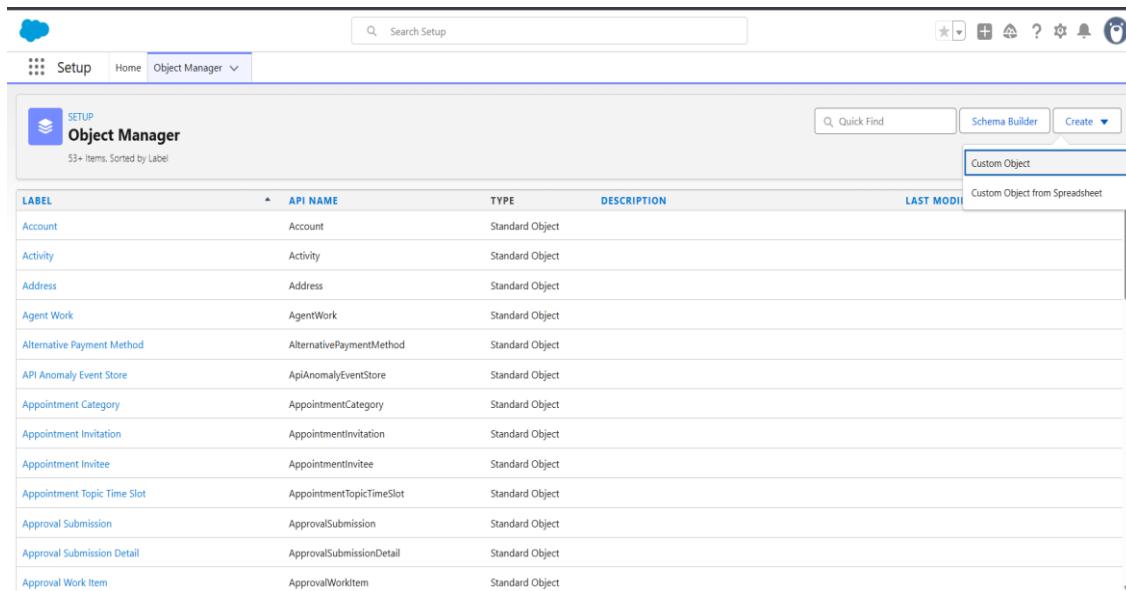
- Salesforce Developer Edition environment created.
- Basic organization settings configured as needed.



## Customization of Objects, Fields & Tabs

### Custom Objects Created

- Handsman Customer
- Handsman Product
- Handsman Order
- Inventory
- Marketing Campaign



The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The Object Manager tab is selected. The page title is "Object Manager" with a subtitle "53+ items. Sorted by Label". On the right, there are buttons for "Quick Find", "Schema Builder", and "Create". A dropdown menu is open, showing "Custom Object" and "Custom Object from Spreadsheet". The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODI. The table lists various standard objects like Account, Activity, Address, etc.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODI
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		

### Custom Tabs Created

- Tabs created for all custom objects for easy navigation.

### Custom Fields

Examples include:

- **Customer:** Email, Phone, Loyalty Status, Full Name (Formula)
- **Product:** SKU, Price, Stock Quantity
- **Order:** Total Amount, Order Date
- **Inventory:** Stock Status (Formula), Restock Needed

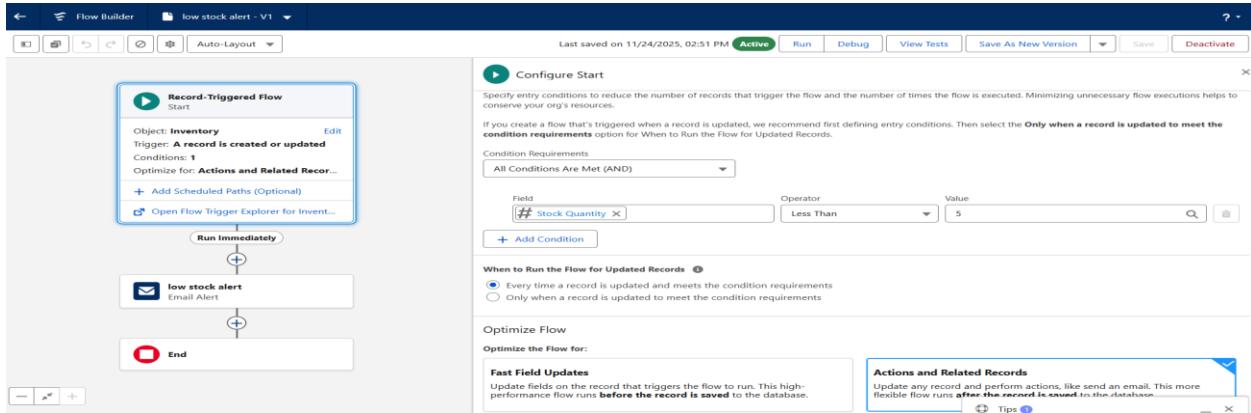
### Object Relationships

- Customer → Order (Lookup)

- Product → Inventory (Master-Detail)
- Order → Product (Lookup)

## Formula Fields

- Full Name (Customer)
- Stock Status (Inventory)
  - Automatically shows “Low Stock”, “In Stock”, or “Out of Stock”.



```

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}

```

The screenshot shows the Salesforce Developer Console with the trigger code for "OrderTotalTrigger.apot". The code triggers on the "HandsMen\_Order\_\_c" object for insert and update events. It collects product IDs, creates a map of products, and then iterates through the orders to calculate the total amount based on quantity and price.

## Validation Rules

- Prevent negative stock values.
- Ensure valid email format.
- Enforce positive order total.

- Ensure required fields are filled.

**HandsMen Customer Validation Rule**

**Validation Rule Detail**

Rule Name	Email	Active
Error Condition Formula	NOT CONTAINS( Email__c , '@gmail.com' )	
Error Message	Please fill Correct Gmail	Error Location
Description		Top of Page
Created By	Jan Jan Garcia, 11/23/2025, 8:06 PM	Modified By
		Jan Jan Garcia, 11/23/2025, 8:06 PM

## Phase 3: UI/UX Development & Customization

### Lightning App Setup

- App Name: **HandsMen Threads**
- Added:
  - Custom Objects
  - Standard items
  - Navigation items for relevant teams

**New Lightning App**

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

<b>App Details</b>	<b>App Branding</b>
* App Name <input type="text" value="HandsMen Threads"/>	Image <input type="file"/>
* Developer Name <input type="text" value="HandsMen_Threads"/>	Primary Color Hex Value <input type="text" value="#0070D2"/>
Description <input type="text" value="Enter a description..."/>	Org Theme Options <input type="checkbox"/>

Next

## Page Layouts & Dynamic Forms

- Sections created for customer details, product data, order information, and inventory tracking.

## User Management

- **Profiles** cloned and customized.
- **Roles** created:
  - CEO
  - Sales
  - Inventory
  - Marketing
- **Users** created and assigned to their respective roles.

The screenshot shows the Salesforce Setup interface for managing Roles. On the left, the navigation sidebar includes 'Setup', 'Home', and 'Object Manager'. Under 'Setup', 'Roles' is selected, which further branches into 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Understanding Roles' and displays a 'Sample Role Hierarchy' diagram. The hierarchy starts with 'Executive Staff' at the top, which includes 'CEO', 'President', 'CFO', and 'VP, Sales'. Arrows point from 'President' and 'VP, Sales' to 'Western Sales Director' and 'Eastern Sales Director' respectively. These two directors each have three sales representatives below them: 'Western Sales Rep', 'CA Sales Rep', 'OR Sales Rep' under Western Sales Director; and 'Eastern Sales Rep', 'NY Sales Rep', 'MA Sales Rep' under Eastern Sales Director. A third level of hierarchy is shown for the Eastern Sales Rep, with 'Asian Sales Rep' and 'European Sales Rep'. A legend on the right side of the diagram provides descriptions for each role level:

- \* View & edit data, roll up reports for all users below this level of other Executive Staff
- \* View & edit data, generate reports for all users directly or all users above or at same level
- \* Can't access data for users above or at same level

A 'Set Up Roles' button is located at the bottom right of the diagram area.

## Phase 4: Data Migration, Testing & Security

### Data Loading

- Manual record entry shown in the video.
- For large-scale import, Data Loader or Import Wizard may be used.

### Field History Tracking

Recommended for:

- Stock Quantity
- Product Price
- Customer Contact Information

### Duplicate & Matching Rules

- Email-based matching for Customer

- SKU-based matching for Product

## Profiles, Roles & Permission Sets

### Profiles

- Customized profiles for Sales, Inventory, and Marketing.

### Roles

- Sales → CEO
- Inventory → CEO
- Marketing → CEO

### Permission Sets

Examples:

- Sales: Full access to Customers and Orders
- Inventory: Read/Edit access to Products and Inventory
- Marketing: Access to Campaigns

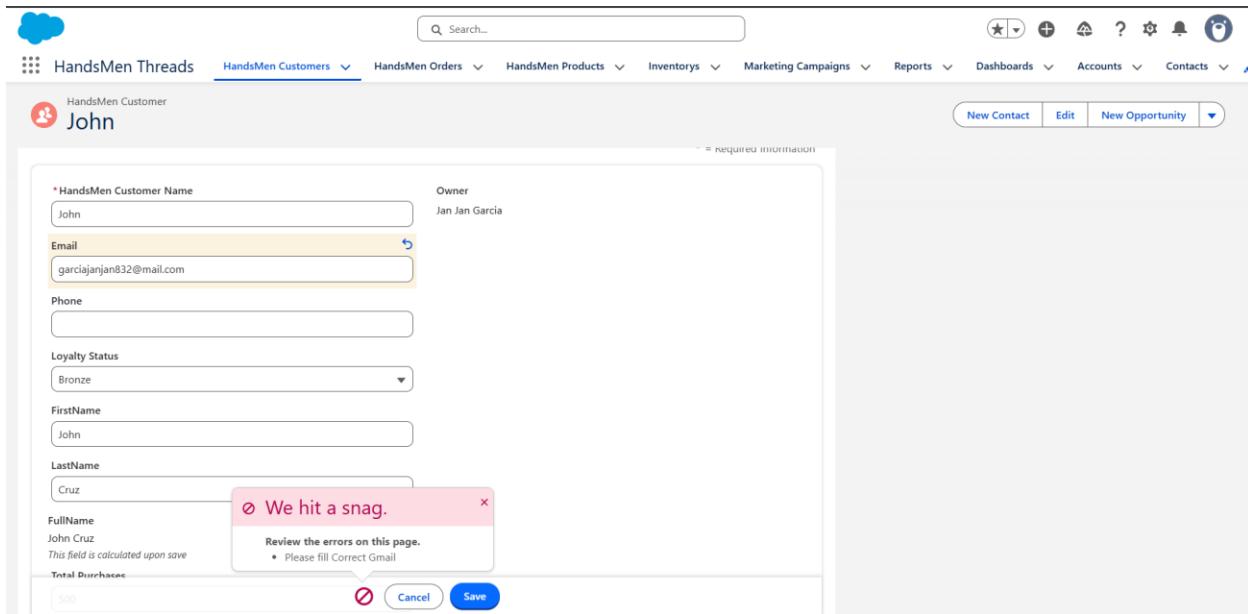
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area has a header 'SETUP Profiles'. It contains sections for 'Data Semantic Search Definitions', 'Data Share Definitions', 'Data Share Sagemaker Connections', 'Data Share Snowflake Connections', 'Data Share Targets', 'Work Plans', 'Work Plan Templates', 'Work Step Templates', 'Work Types', and 'Work Type Groups'. Below these are 'Custom Object Permissions' for 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products', and for 'Inventory' and 'Marketing Campaigns'. At the bottom are 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8).

### Test Cases

Examples include:

- Customer creation (valid/invalid email).
- Order creation with total amount validation.

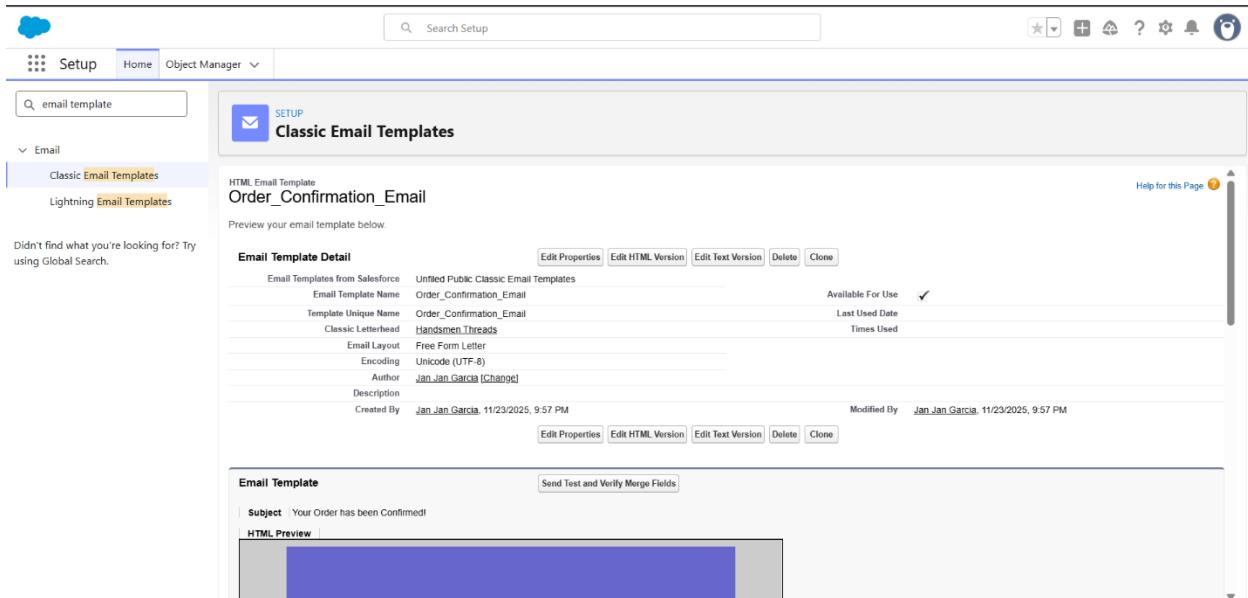
- Product creation with required field checks.
- Inventory stock status formula test.



## Phase 5: Deployment, Documentation & Maintenance

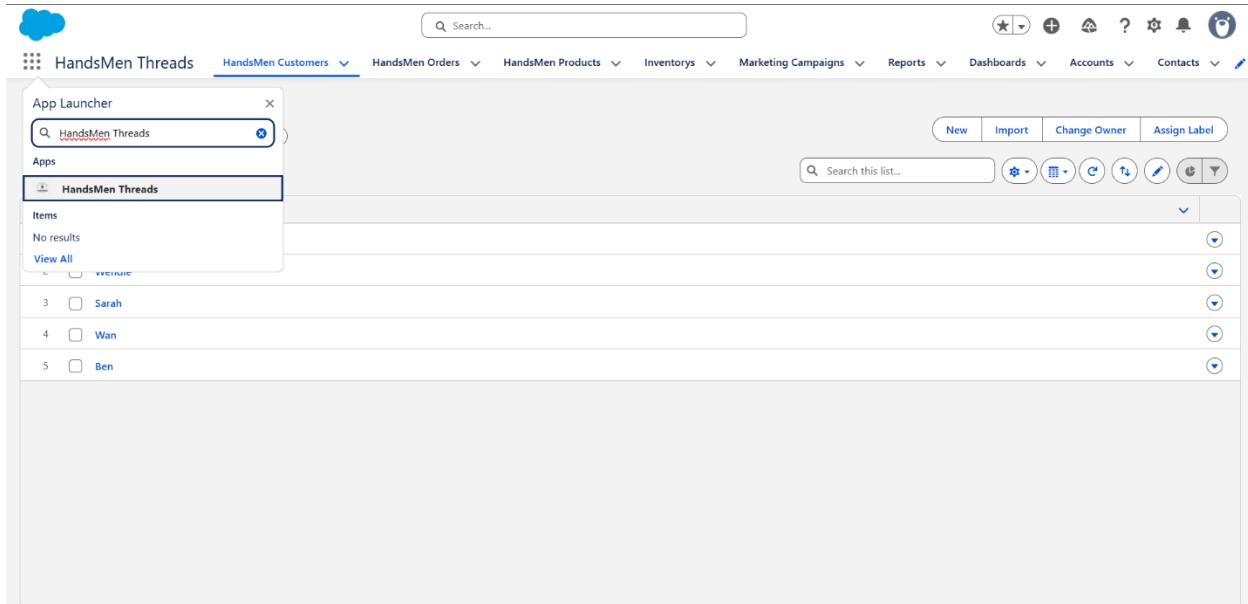
### Deployment Strategy

- Change Sets recommended for migrating components into a production environment.
- Includes: Objects, Fields, Validation Rules, Profiles, Roles, Permission Sets, Email Templates.



## Maintenance

- Regular updates for inventory fields.
- Role and profile audits.
- Ongoing validation rule monitoring.



## Troubleshooting

- Debug Logs for tracking automation errors.
- Field-level history for identifying incorrect updates.
- Permission checks for access issues.

## Conclusion

The HandsMen Threads Salesforce CRM project integrates essential business processes such as customer management, sales tracking, inventory control, and marketing administration into a single streamlined platform. Through the use of custom objects, relationships, validation rules, and a secure role-based model, the system significantly enhances operational efficiency and ensures accurate information flow. This project strengthens the foundation for future enhancements including automation flows, approval processes, email automation, dashboards, and AI-based recommendations.