

**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 for Permission Sets. The left sidebar has a search bar with 'Permission Sets' entered and a list of navigation items including 'Users' and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a sub-header 'SETUP'. Below this, there's a section 'All Permission Sets' with a table of permission sets. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists several legacy permission sets (marked with a 'Clone' button) and current ones. The bottom of the page shows pagination information: '1-25 of 97', '0 Selected', and 'Page 1 of 4'.

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

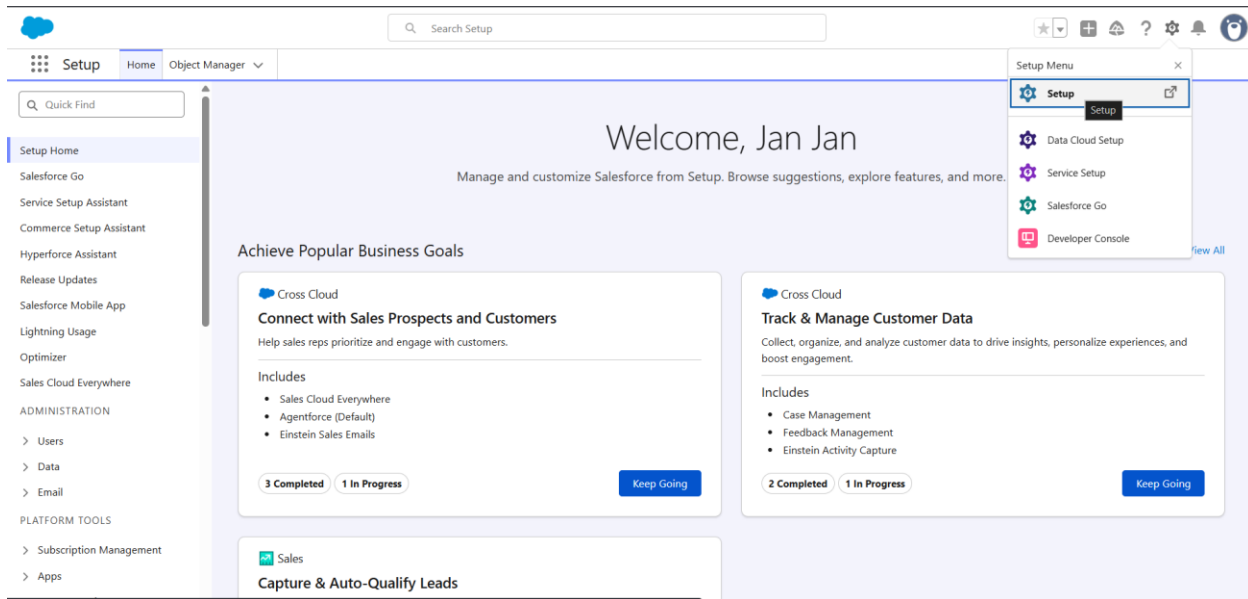
Stakeholder Mapping

- **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

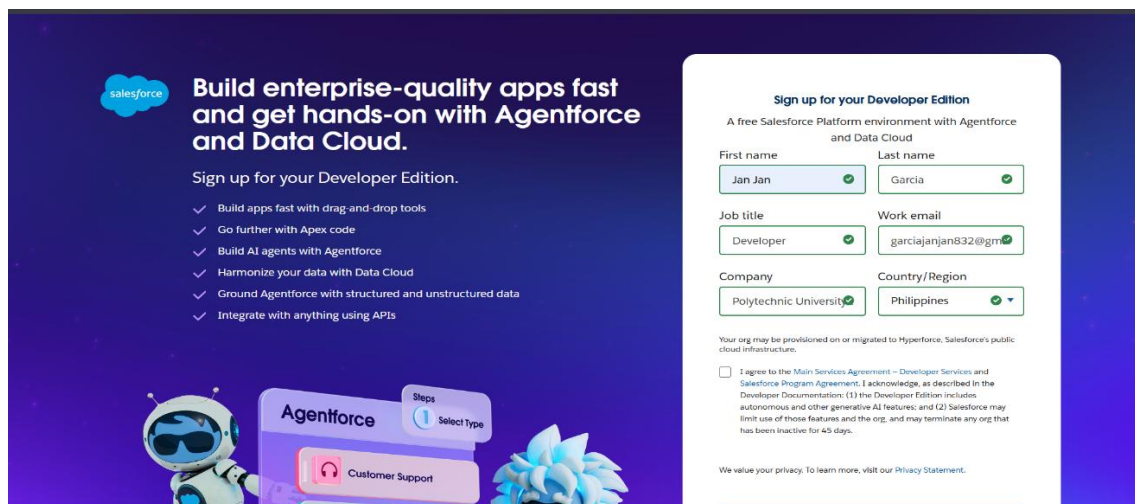
- Object & Field Creation
- App & UI Configuration
- Security Setup
- Validation Rules & Automation
- Testing & Deployment



Phase 2: Salesforce Development – Backend & Configurations

Setup Environment

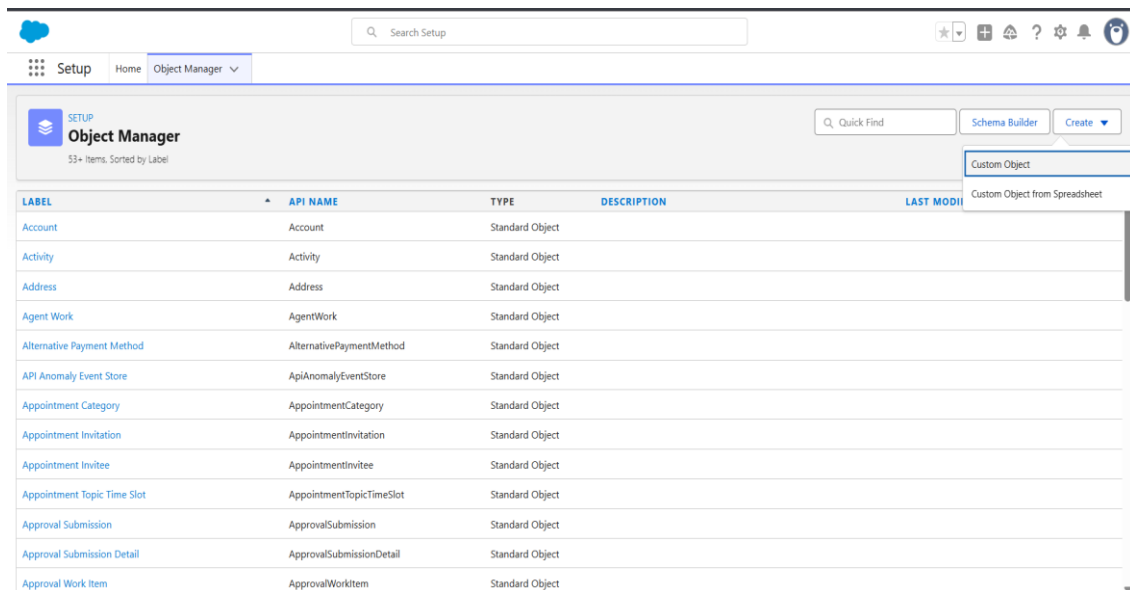
- Salesforce Developer Edition environment created.
- Basic organization settings configured as needed.



Customization of Objects, Fields & Tabs

Custom Objects Created

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



The screenshot shows the Salesforce Setup interface, specifically the Object Manager. The top navigation bar includes the Setup menu, Home, and Object Manager. A search bar is present. The main content area shows the Object Manager header with a 'Quick Find' search bar, 'Schema Builder' button, and 'Create' dropdown. A table lists standard objects with columns for Label, API Name, Type, Description, and Last Modified. A 'Custom Object' button is visible on the right side of the table.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
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”.

The screenshot shows the Salesforce Flow Builder interface for a flow named 'low stock alert - V1'. The flow is a 'Record-Triggered Flow' with the object 'Inventory'. The trigger is 'A record is created or updated'. The flow has one condition: 'Stock Quantity' is 'Less Than' '5'. The flow is optimized for 'Actions and Related Records'. The flow steps are: 'Run Immediately' (Start), 'low stock alert' (Email Alert), and 'End'.

Configure Start

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field: **Stock Quantity** Operator: **Less Than** Value: **5**

+ Add Condition

When to Run the Flow for Updated Records

☒ Every time a record is updated and meets the condition requirements

☐ Only when a record is updated to meet the condition requirements

Optimize Flow

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.

Actions and Related Records

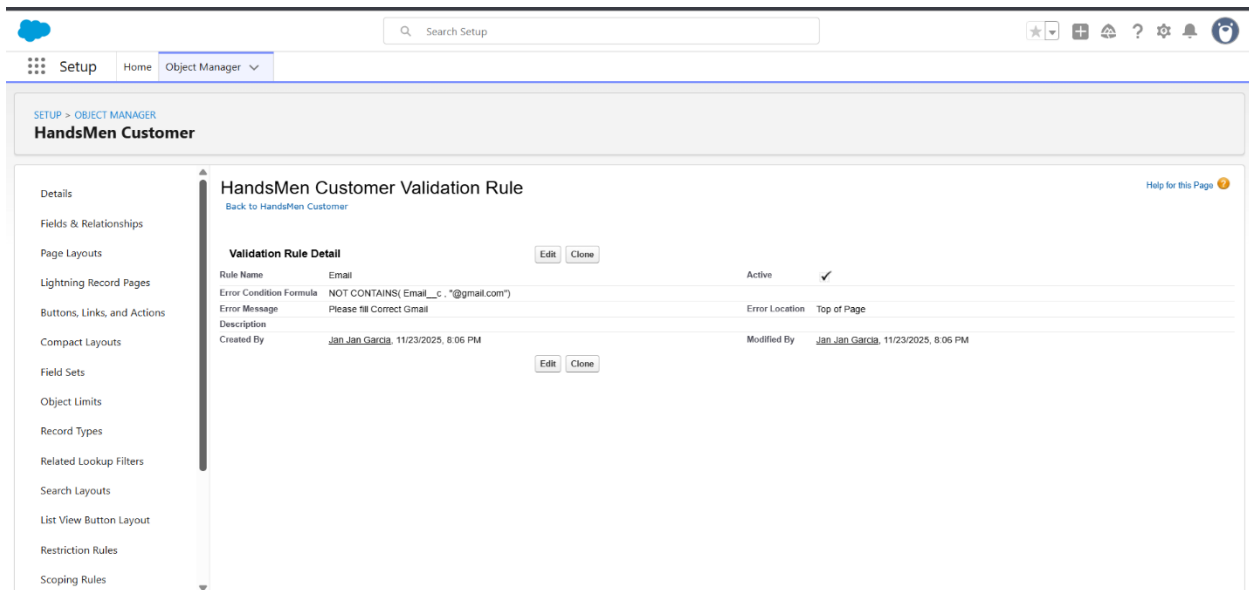
Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.

Validation Rules

- Prevent negative stock values.
- Ensure valid email format.
- Enforce positive order total.
- Ensure required fields are filled.

The screenshot shows the Salesforce Setup - Object Manager page. It displays a list of custom objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are HandsMen Customer, HandsMen Order, and HandsMen Product.

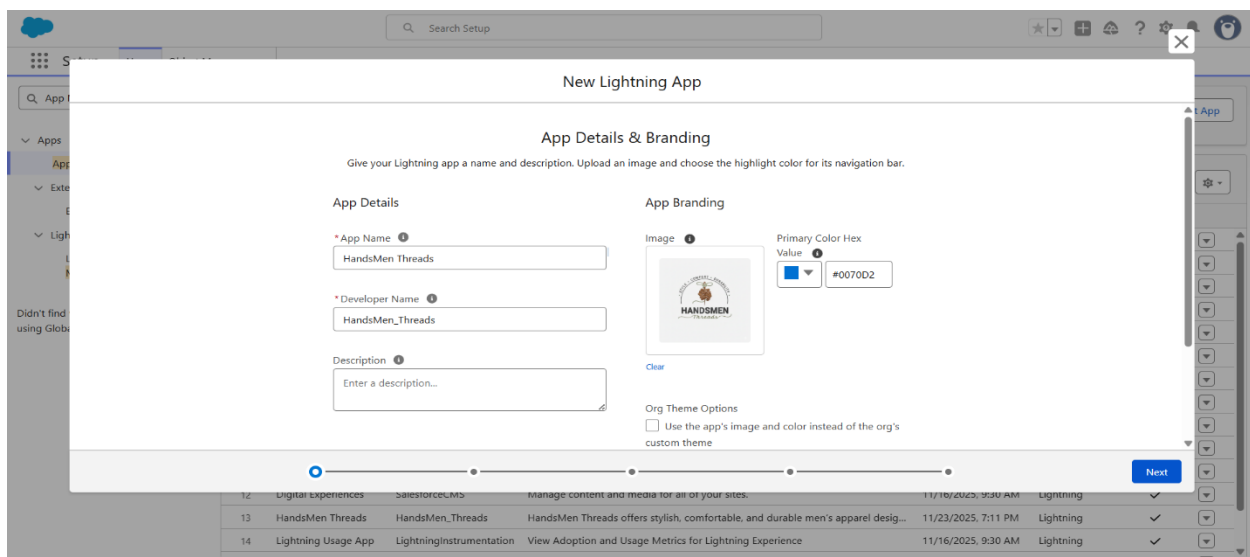
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer_c	Custom Object		11/23/2025	✓
HandsMen Order	HandsMen_Order_c	Custom Object		11/23/2025	✓
HandsMen Product	HandsMen_Product_c	Custom Object		11/23/2025	✓



Phase 3: UI/UX Development & Customization

Lightning App Setup

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



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 displays the Salesforce Setup interface, specifically the 'Roles' page. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Understanding Roles' and includes a search bar at the top. Below the title, there is a section for 'Sample Role Hierarchy' with a dropdown menu set to 'Territory-based Sample'. The hierarchy diagram shows a top-level 'Executive Staff' role (CEO, President, CFO, VP, Sales) which branches into three regional sales director roles: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director role further branches into three regional sales representative roles: 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. The diagram also includes a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

https://orgfam-114bb3dcce-dev-ed.develop.my.salesforce-setup.com/lightning/setup/Roles/home

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 for the 'Profiles' section. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP Profiles' and contains several sections:

- Data Semantic Search Definitions:** A table with 8 columns (Read, Create, Edit, Delete, View All Records, Modify All Records, View All Fields) and 5 rows (Data Semantic Search Definitions, Data Share Definitions, Data Share Sagemaker Connections, Data Share Snowflake Connections, Data Share Targets).
- Work Plans:** A table with 8 columns (Read, Create, Edit, Delete, View All Records, Modify All Records, View All Fields) and 4 rows (Work Plans, Work Plan Templates, Work Step Templates, Work Types, Work Type Groups).
- Custom Object Permissions:** A table with 8 columns (Read, Create, Edit, Delete, View All Records, Modify All Records, View All Fields) and 3 rows (HandsMen Customers, HandsMen Orders, HandsMen Products).
- Session Settings:** A section with two settings: 'Session Times Out After' (set to 2 hours of inactivity) and 'Session Security Level Required at Login' (set to --None--).
- Password Policies:** A section with three settings: 'User passwords expire in' (set to 90 days), 'Enforce password history' (set to 3 passwords remembered), and 'Minimum password length' (set to 8).

Test Cases

Examples include:

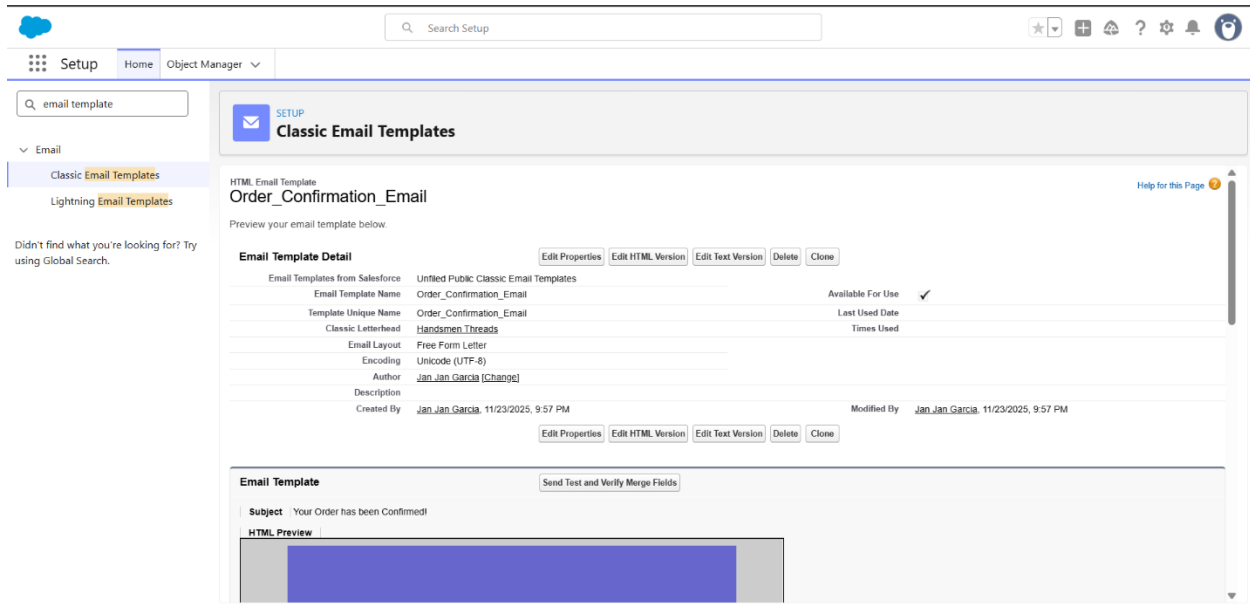
- Customer creation (valid/invalid email).
- Order creation with total amount validation.
- Product creation with required field checks.
- Inventory stock status formula test.

The screenshot displays a web application interface for managing customers. The top navigation bar includes a search bar and various menu items like 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The main content area shows a form for creating a new customer named 'John'. The form fields include 'HandsMen Customer Name' (filled with 'John'), 'Email' (filled with 'garciajan32@mail.com'), 'Phone', 'Loyalty Status' (set to 'Bronze'), 'FirstName' (filled with 'John'), 'LastName' (filled with 'Cruz'), and 'FullName' (calculated as 'John Cruz'). A validation error message is displayed: 'We hit a snag. Review the errors on this page. Please fill Correct Gmail'. The form also includes a 'Total Purchases' field and 'Cancel' and 'Save' buttons.

Phase 5: Deployment, Documentation & Maintenance

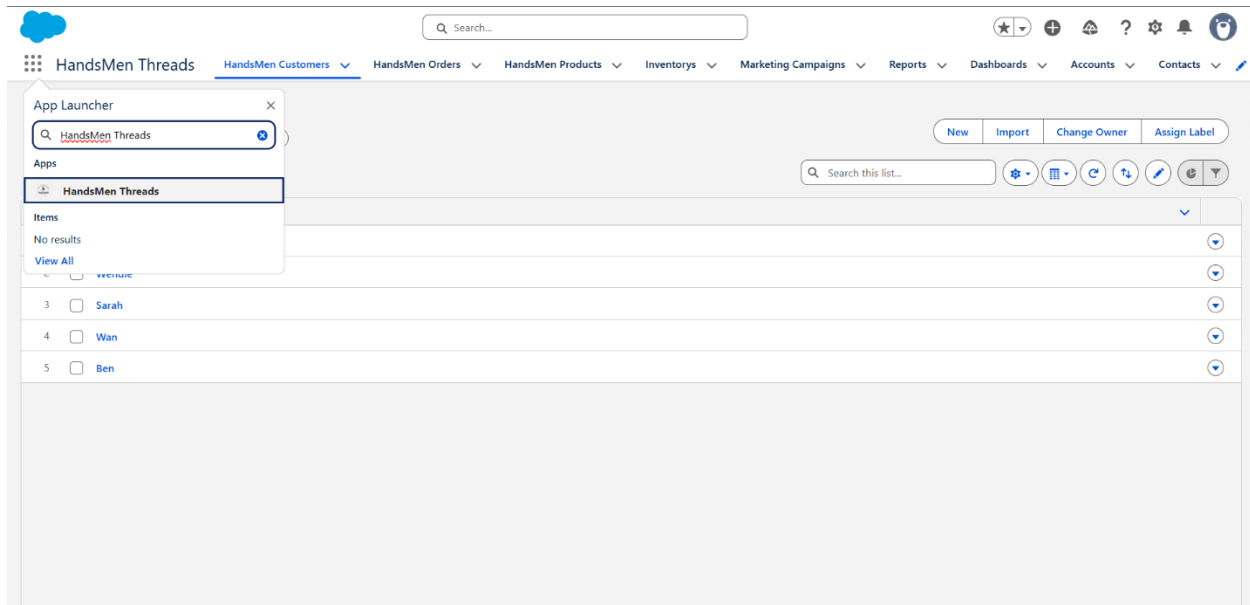
Deployment Strategy

- 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.