

# **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		

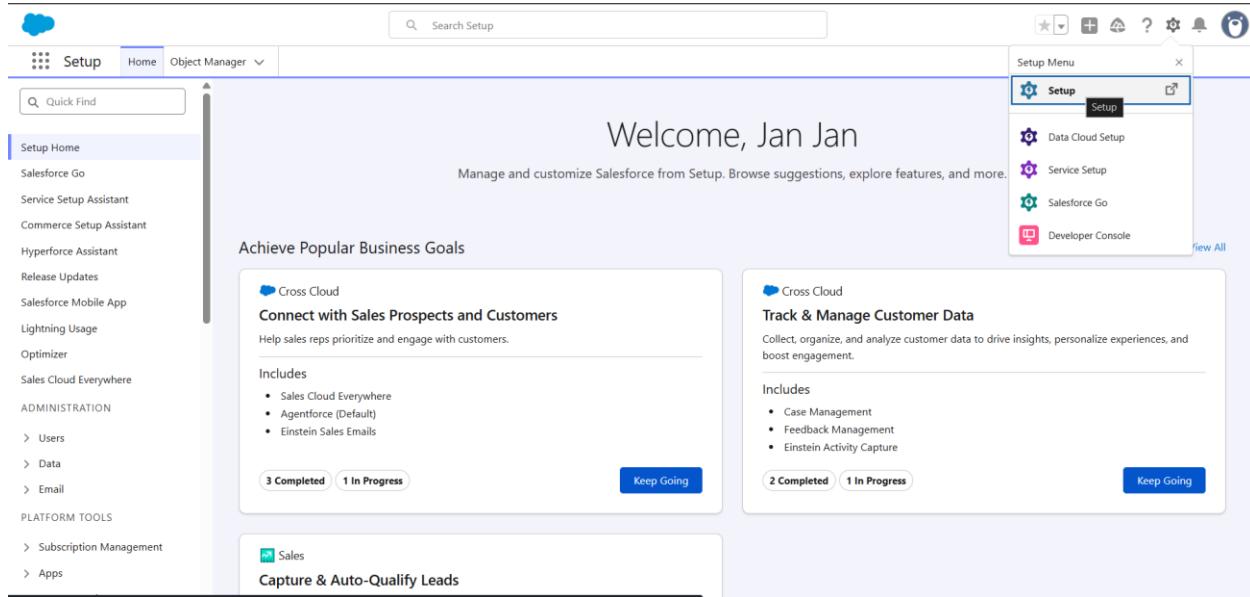
## Stakeholder Mapping

- **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

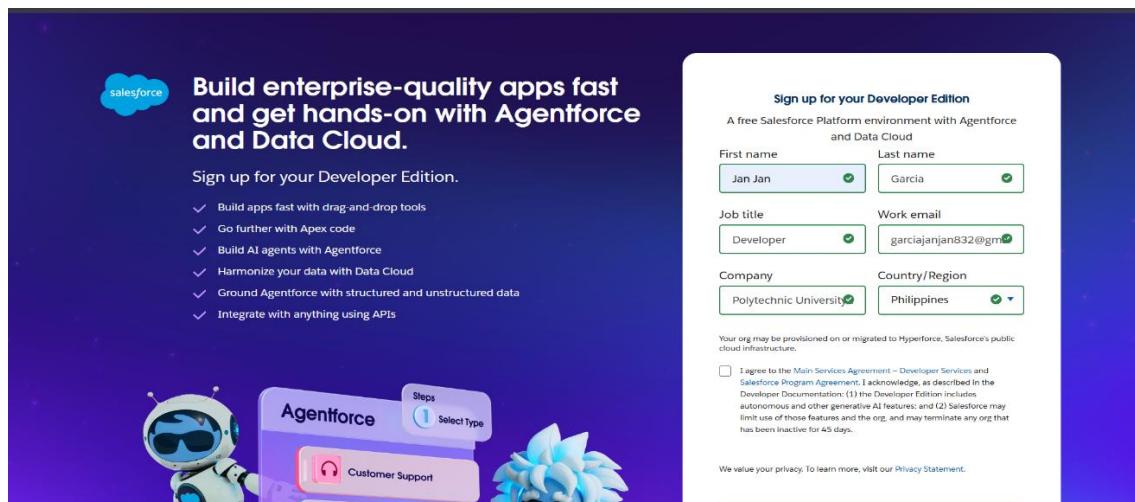
- Object & Field Creation
- App & UI Configuration
- Security Setup
- Validation Rules & Automation
- Testing & Deployment



## Phase 2: Salesforce Development – Backend & Configurations

### Setup Environment

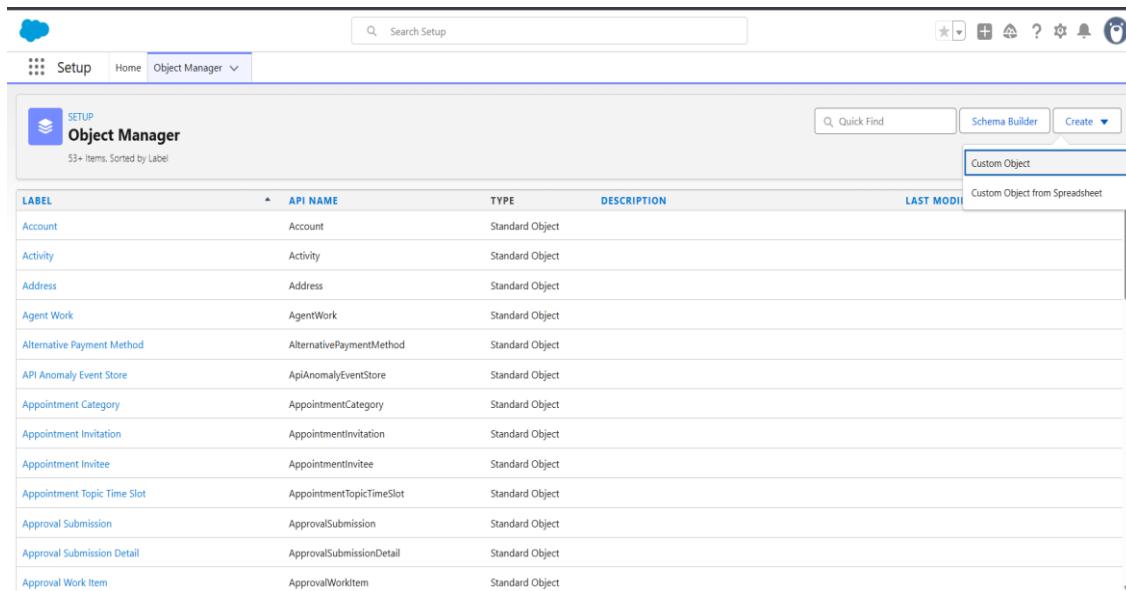
- Salesforce Developer Edition environment created.
- Basic organization settings configured as needed.



## 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. In the center, there is a table titled "Object Manager" with 53+ items, sorted by Label. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODI. The table lists various standard objects such as Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. The "TYPE" column indicates they are all Standard Objects. The "DESCRIPTION" column provides a brief description of each object. The "LAST MODI" column shows the last modification date for each 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

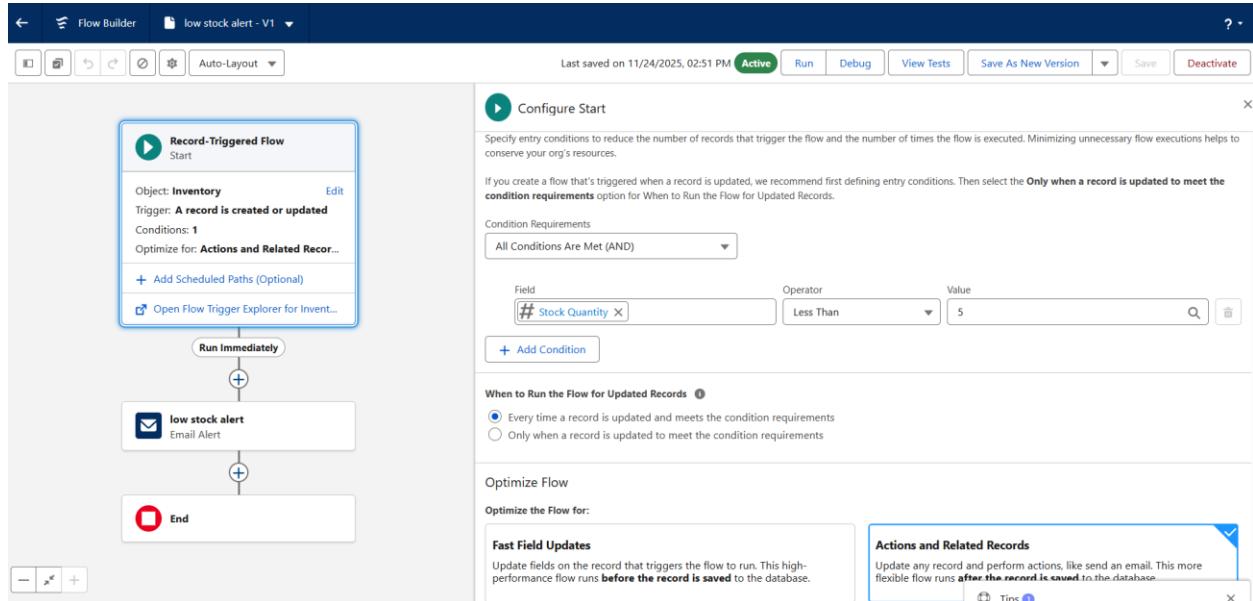
### Object Relationships

- 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”.



## Validation Rules

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

The screenshot shows the Object Manager interface under the "SETUP" tab. It lists three custom objects: "HandsMen Customer", "HandsMen Order", and "HandsMen Product", all of which are "Custom Object". The "Last Modified" column shows the date "11/23/2025" for all three. The "Deployed" column shows a checkmark for all three. A search bar at the top right is set to "HandsMen".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various global buttons. The main header reads "SETUP > OBJECT MANAGER" and "HandsMen Customer". On the left, a sidebar lists various object configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The central content area displays a "Validation Rule Detail" for the "HandsMen Customer Validation Rule". The rule details are as follows:

Field	Value
Rule Name	Email
Error Condition Formula	NOT CONTAINS( Email__c , ".@gmail.com")
Error Message	Please fill Correct Gmail
Description	
Created By	Jan Jan Garcia, 11/23/2025, 8:06 PM
Active	<input checked="" type="checkbox"/>
Error Location	Top of Page
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

The screenshot shows the "New Lightning App" setup screen. The title bar says "New Lightning App". The main area is divided into two sections: "App Details" and "App Branding".

**App Details**

- \* App Name: HandsMen Threads
- \* Developer Name: HandsMen\_Threads
- Description: Enter a description...

**App Branding**

- Image: A placeholder image for the app icon.
- Primary Color Hex: #0070D2
- Org Theme Options: A checkbox for "Use the app's image and color instead of the org's custom theme".

At the bottom, there is a progress bar with steps 12, 13, and 14 completed, and a "Next" button.

## 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 Roles page. The left sidebar has sections for Users, Roles (selected), Feature Settings, Sales (Contact Roles on Contracts, Contact Roles on Opportunities), Service, and Case Teams. A note says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Understanding Roles" and shows a "Sample Role Hierarchy". It includes a dropdown for "View other sample Role Hierarchies" set to "Territory-based Sample". The hierarchy diagram starts with "Executive Staff" (CEO, President, CFO, VP, Sales) at the top level. Arrows point down to "Western Sales Director" (Dir. of W. Sales), "Eastern Sales Director" (Dir. of E. Sales), and "International Sales Director" (Dir. of Int'l Sales). Arrows then point down to "Western Sales Rep" (CA Sales Rep, OR Sales Rep), "Eastern Sales Rep" (NY Sales Rep, MA Sales Rep), and "International Sales Rep" (Asian Sales Rep, European Sales Rep). Descriptions for each level indicate permissions like "View & edit data, roll up forecasts, & generate reports for users directly below" and "Can't access data of other Executive Staff". A "Set Up Roles" button and a "Don't show this page again" checkbox are at the bottom.

## 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' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. On the left, there's a sidebar with 'Profiles' selected, and a message: 'Didn't find what you're looking for? Try using Global Search.' Below the sidebar, there are sections for 'Data Semantic Search Definitions', 'Data Share Definitions', 'Data Share SageMaker Connections', 'Data Share Snowflake Connections', and 'Data Share Targets'. To the right, there are sections for 'Work Plans', 'Work Plan Templates', 'Work Step Templates', 'Work Types', and 'Work Type Groups', each with a grid of checkboxes. Below these, there are two main sections for 'Custom Object Permissions': one for 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products', and another for 'Inventory' and 'Marketing Campaigns'. Each section has a grid of checkboxes for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). At the bottom, there 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). The overall interface is light blue and white, with a clean, modern design.

## 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 shows a Salesforce interface for editing a customer record named 'John'. The top navigation bar includes links for HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. The main content area displays fields for 'HandsMen Customer Name' (John), 'Email' (garciajanjan832@mail.com), 'Phone', 'Loyalty Status' (Bronze), 'FirstName' (John), and 'LastName' (Cruz). A modal window titled 'We hit a snag.' contains the message: 'Review the errors on this page.' followed by a bullet point: 'Please fill Correct Gmail'. The bottom of the screen shows a 'Save' button.

## 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.

Search Setup

Setup Home Object Manager

email template

Classic Email Templates

Order\_Confirmation\_Email

HTML Email Template

Email Template Detail

Email Templates from Salesforce

Email Template Name: Order\_Confirmation\_Email

Template Unique Name: Order\_Confirmation\_Email

Classic Letterhead: HandsMen Threads

Email Layout: Free Form Letter

Encoding: Unicode (UTF-8)

Author: Jan Jan Garcia [Change]

Description:

Created By: Jan Jan Garcia, 11/23/2025, 9:57 PM

Available For Use: ✓

Last Used Date:

Times Used:

Modified By: Jan Jan Garcia, 11/23/2025, 9:57 PM

Help for this Page

Email Template

Send Test and Verify Merge Fields

Subject: Your Order has been Confirmed!

HTML Preview

## Maintenance

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

Search...

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventory

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

New Import Change Owner Assign Label

Search this list...

App Launcher

HandsMen Threads

Apps

HandsMen Threads

Items

No results

View All

Sarah

Wan

Ben

## 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.