

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

by

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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 displays the Salesforce Setup interface, specifically the 'Permission Sets' page. The left sidebar shows the 'Setup' menu with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and includes a search bar and a table of existing permission sets. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The 'Action' column contains a 'Clone' button for each row. The 'Permission Set Name' column lists various roles like 'Data Cloud Data Aware Specialist' and 'Agentforce Default Admin'. The 'Description' column provides details about each role's permissions and deprecation status. The 'License' column lists the associated license type, such as 'Customer Data Platform' or 'Agentforce (Default)'.

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

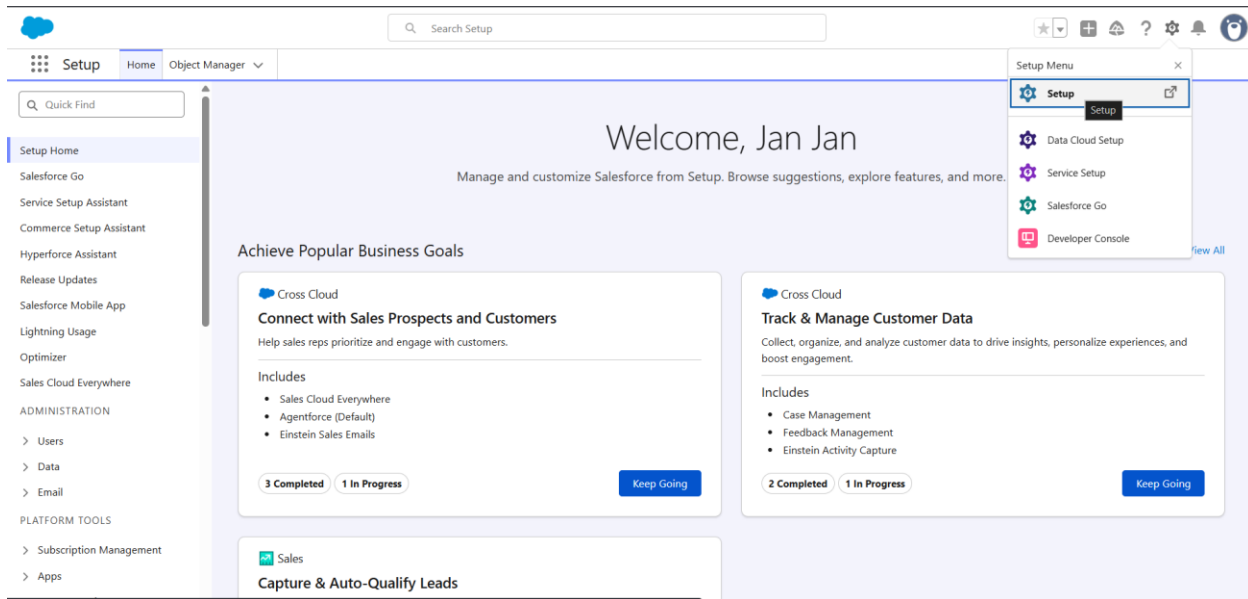
Stakeholder Mapping

- **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

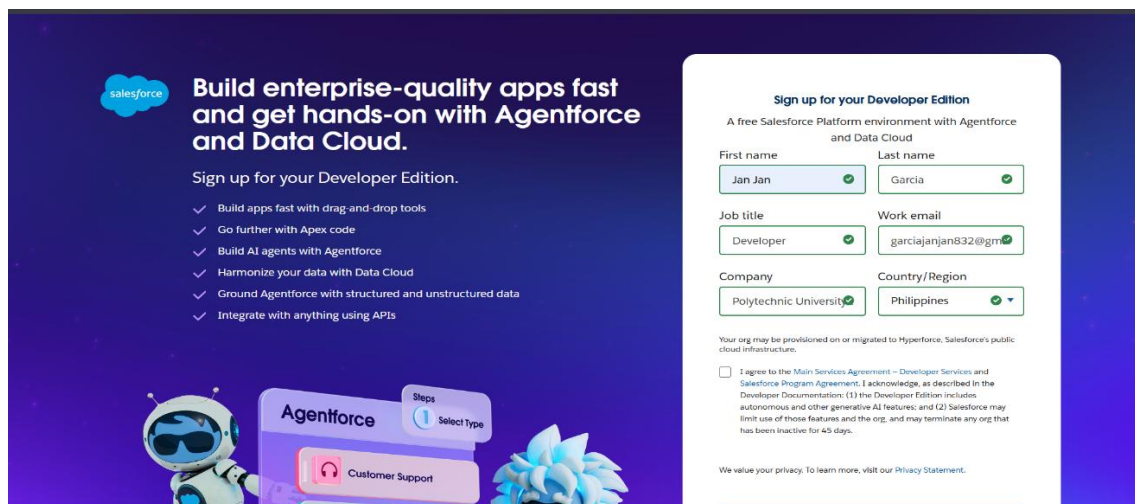
- Object & Field Creation
- App & UI Configuration
- Security Setup
- Validation Rules & Automation
- Testing & Deployment



Phase 2: Salesforce Development – Backend & Configurations

Setup Environment

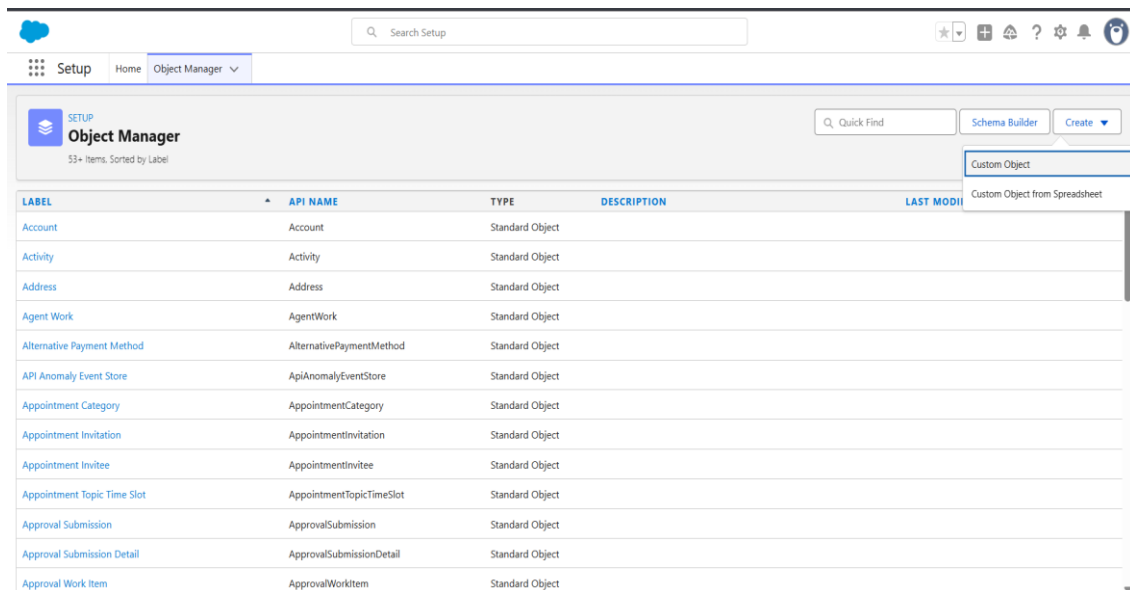
- Salesforce Developer Edition environment created.
- Basic organization settings configured as needed.



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 displays a list of objects with columns for Label, API Name, Type, Description, and Last Modified. A 'Custom Object' button is visible in the top right corner of the object list area.

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

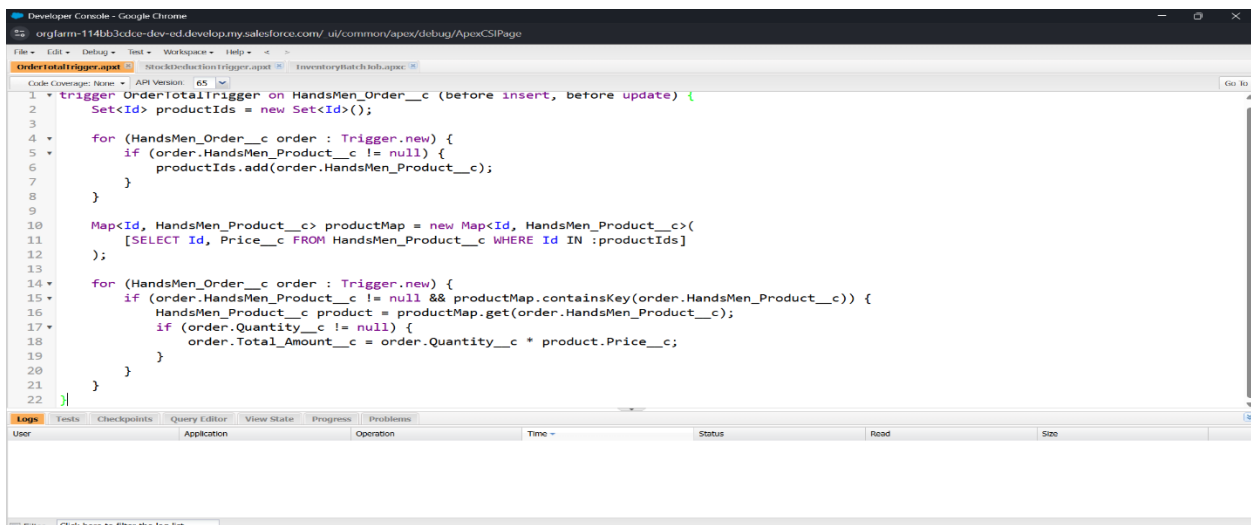
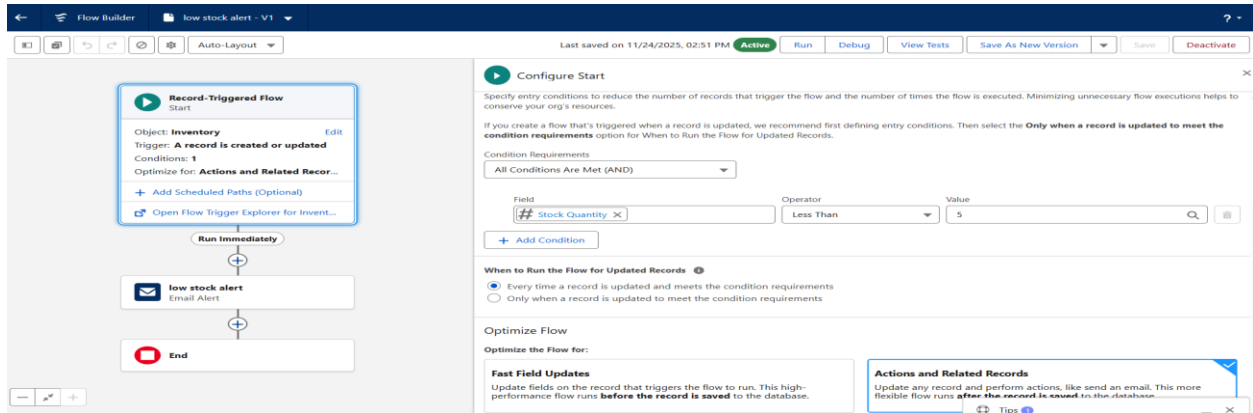
Object Relationships

- Customer → Order (Lookup)

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

Formula Fields

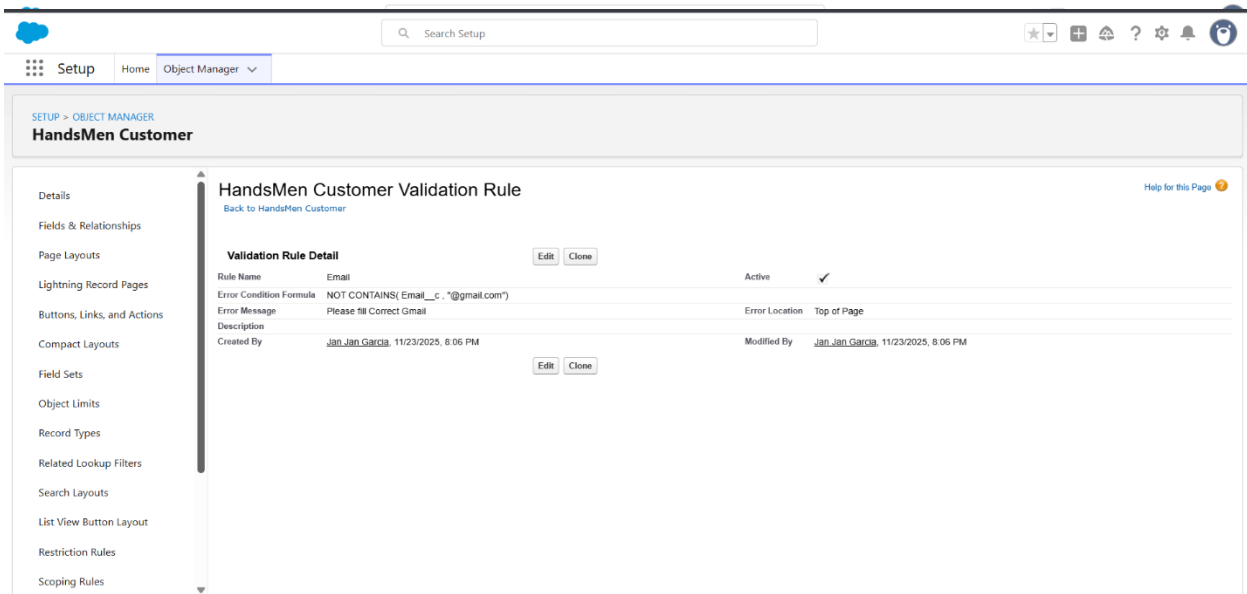
- Full Name (Customer)
- Stock Status (Inventory)
 - Automatically shows “Low Stock”, “In Stock”, or “Out of Stock”.



Validation Rules

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

- Ensure required fields are filled.



SETUP > OBJECT MANAGER
HandsMen Customer

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

HandsMen Customer Validation Rule

[Back to HandsMen Customer](#)

Validation Rule Detail Edit Clone

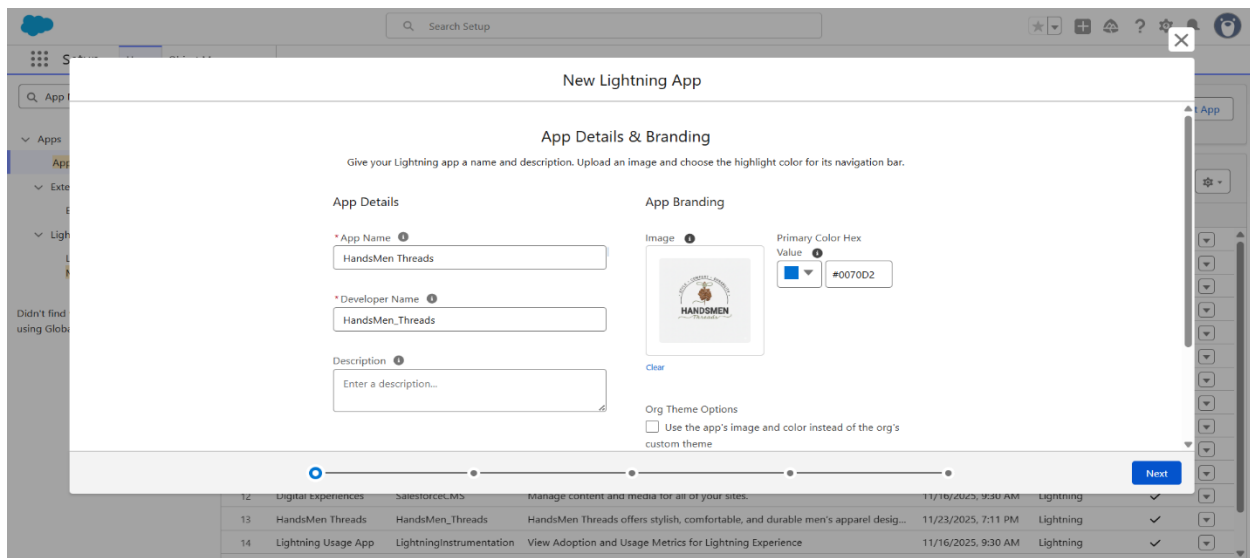
Rule Name	Email	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT CONTAINS(Email__c, "@gmail.com")		
Error Message	Please fill Correct Gmail	Error Location	Top of Page
Description			
Created By	Jan Jan Garcia, 11/23/2025, 8:06 PM	Modified By	Jan Jan Garcia, 11/23/2025, 8:06 PM

Edit Clone

Phase 3: UI/UX Development & Customization

Lightning App Setup

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



Search Setup

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.


App Details

* App Name ¹
HandsMen Threads

* Developer Name ¹
HandsMen_Threads

Description ¹
Enter a description...

App Branding

Image ¹


Primary Color Hex Value ¹
#0070D2

[Clear](#)

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

[Next](#)

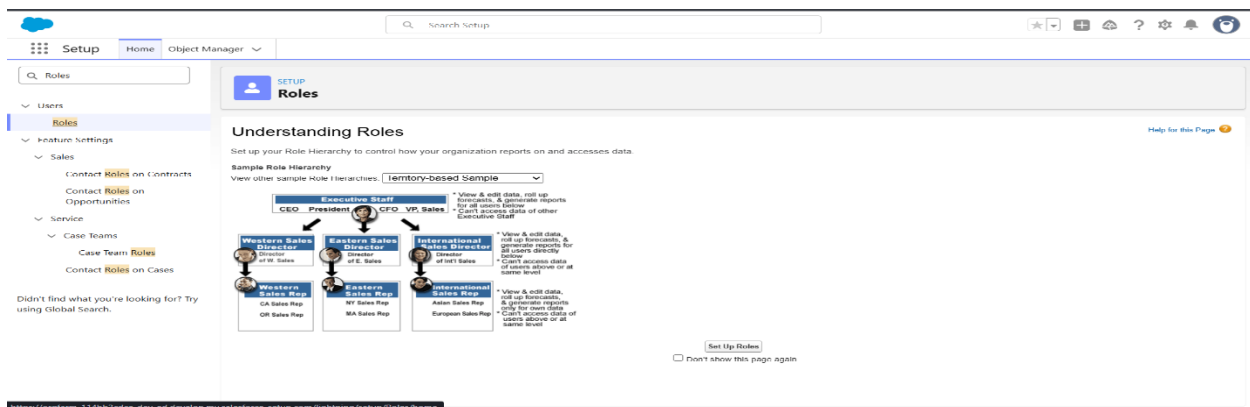
ID	Name	Object	Description	Created	App	Theme
12	Digital experiences	salesforce.com	Manage content and media for all of your sites.	11/16/2025, 9:30 AM	Lightning	✓
13	HandsMen Threads	HandsMen_Threads	HandsMen Threads offers stylish, comfortable, and durable men's apparel design...	11/23/2025, 7:11 PM	Lightning	✓
14	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	11/16/2025, 9:30 AM	Lightning	✓

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.



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 Profiles. The left sidebar has a search bar for 'Profiles' and a 'Users' section. The main content area is titled 'SETUP Profiles' and contains several sections:

- Profiles:** A table with checkboxes for various permissions. The 'HandsMen' profiles are highlighted.
- Custom Object Permissions:** A table with checkboxes for permissions on custom objects like 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products'.
- Session Settings:** A section with dropdowns for '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 dropdowns for '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.

HandsMen Customer
John

* HandsMen Customer Name: John
Owner: Jan Jan Garcia

Email: garciajan832@mail.com
Phone:
Loyalty Status: Bronze
FirstName: John
LastName: Cruz
FullName: John Cruz
This field is calculated upon save
Total Purchases: 100

We hit a snag.
Review the errors on this page.
• Please fill Correct Gmail

Cancel Save

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.

Setup Home Object Manager

Search Setup

email template

Classic Email Templates

Lightning Email Templates

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

SETUP Classic Email Templates

HTML Email Template
Order_Confirmation_Email

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Untied Public Classic Email Templates	Available For Use	✓
Email Template Name	Order_Confirmation_Email	Last Used Date	
Template Unique Name	Order_Confirmation_Email	Times Used	
Classic Letterhead	HandsMen.Threads		
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Jan Jan Garcia (Chaboe)		
Description			
Created By	Jan Jan Garcia, 11/23/2025, 9:57 PM	Modified By	Jan Jan Garcia, 11/23/2025, 9:57 PM

Email Template

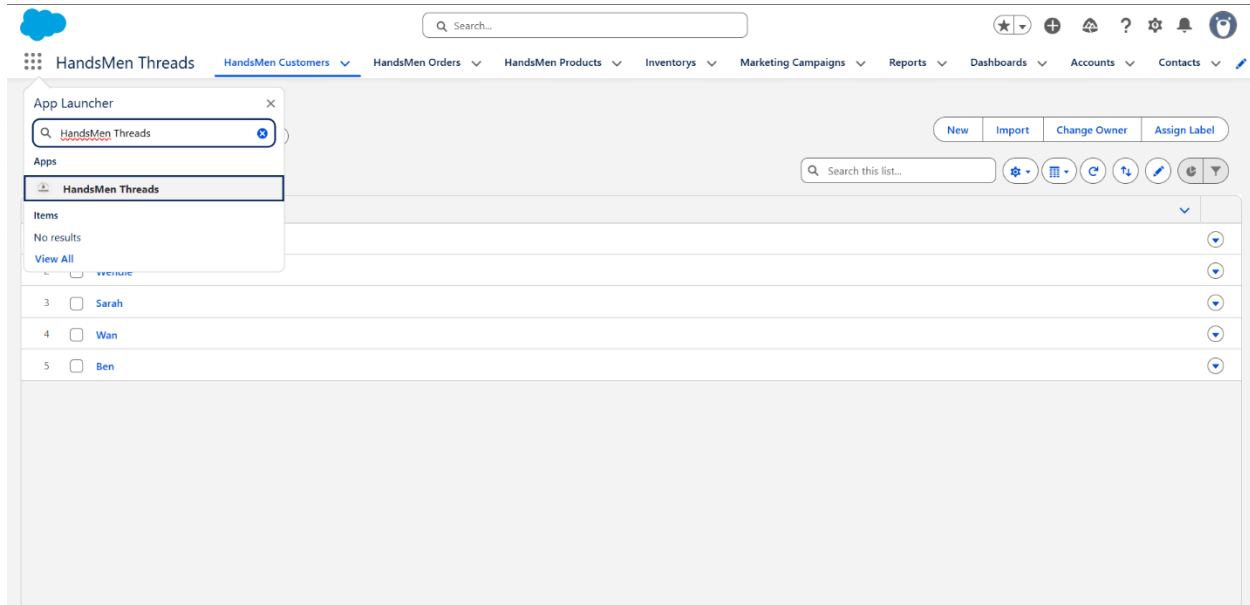
Send Test and Verify Merge Fields

Subject Your Order has been Confirmed!

HTML Preview

Maintenance

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



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.