

**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 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 'On this page you can create, view, and manage permission sets.' Below this is a table of permission sets with columns for Action, Permission Set Name, Description, and License. The table lists various permission sets, including legacy ones and newer ones like 'Agentforce Service Agent Secure Base'. The bottom of the page shows pagination information: '1-25 of 97' and '0 Selected'.

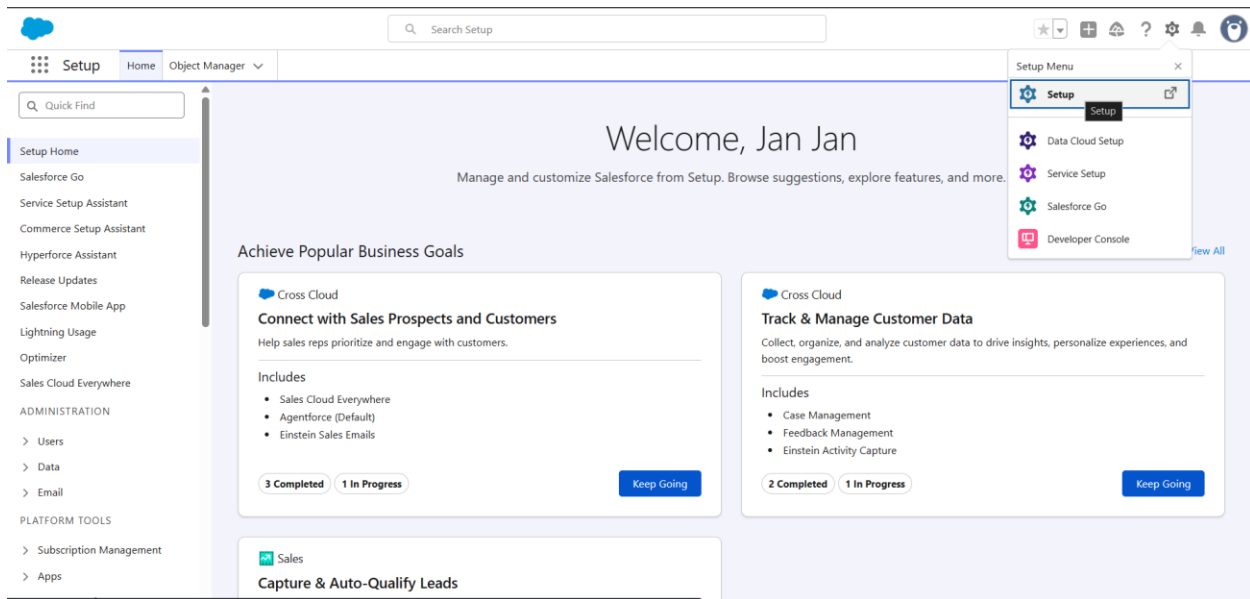
## Stakeholder Mapping

- **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

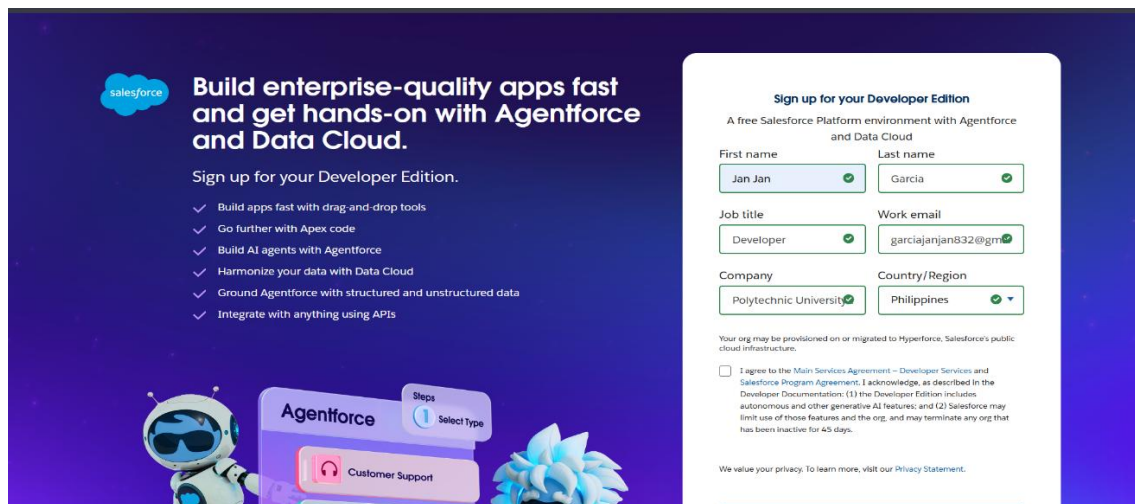
- Testing & Deployment



## Phase 2: Salesforce Development – Backend & Configurations

### Setup Environment

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

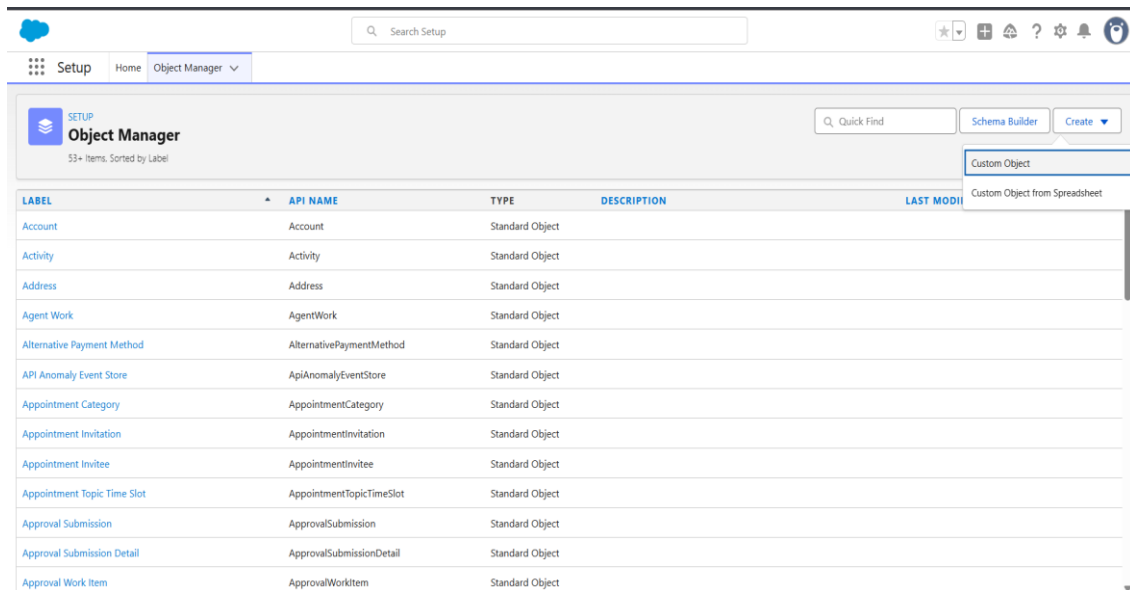


## Customization of Objects, Fields & Tabs

### Custom Objects Created

- Handsman Customer

- Handsman Product
- Handsman Order
- Inventory
- Marketing Campaign



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Object Manager' header includes a 'Quick Find' search bar, 'Schema Builder', and a 'Create' dropdown menu. The main content area displays a table of standard objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The objects listed include 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. All are listed as 'Standard Object'.

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:

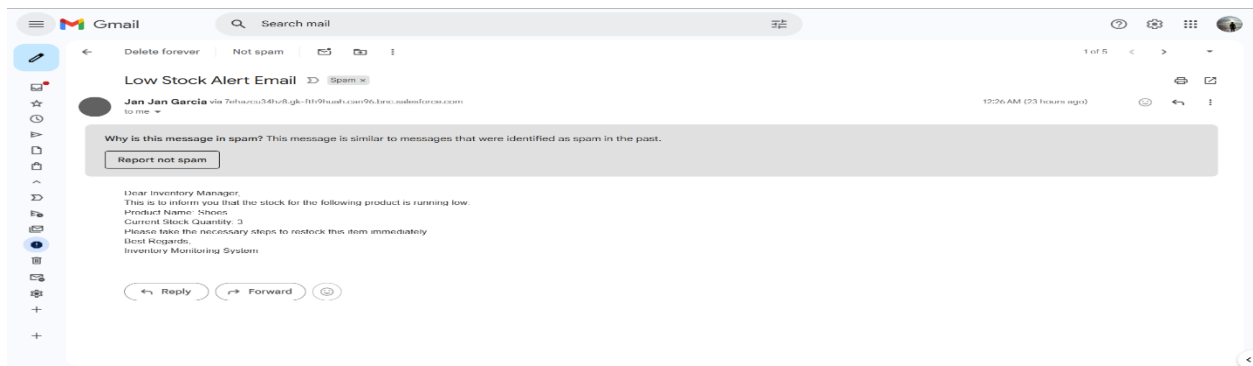
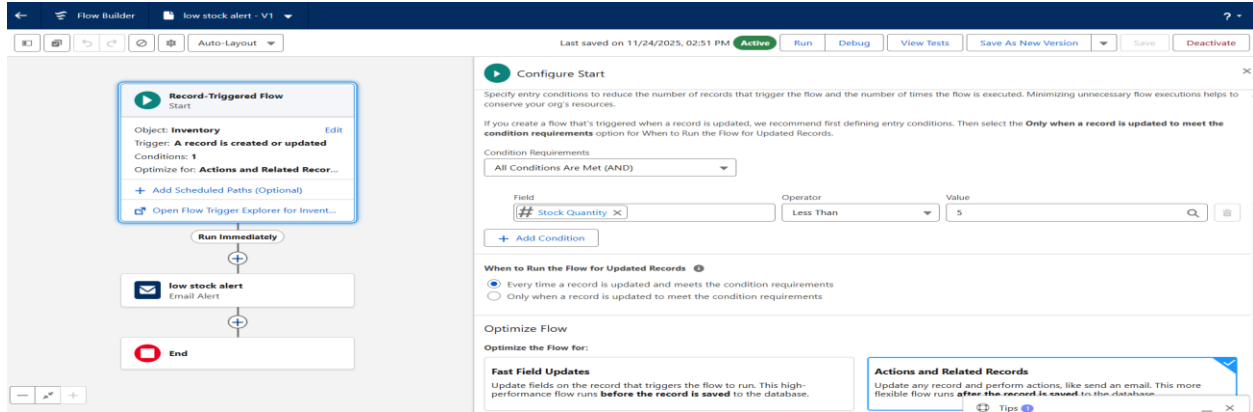
- **Customer:** Email, Phone, Loyalty Status, Full Name (Formula)
- **Product:** SKU, Price, Stock Quantity
- **Order:** Total Amount, Order Date
- **Inventory:** Stock Status (Formula), Restock Needed

## Object Relationships

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

## Formula Fields

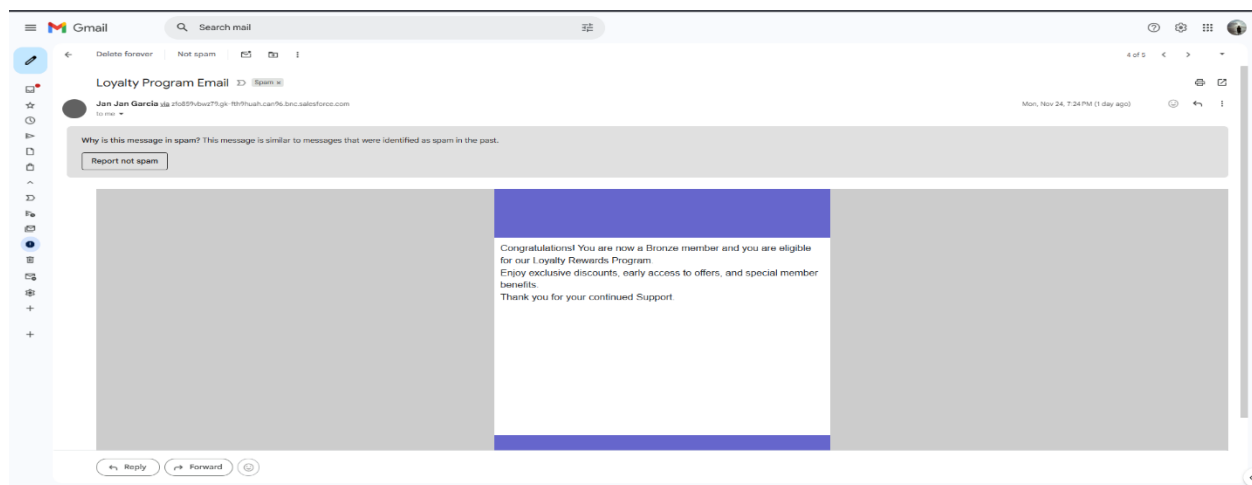
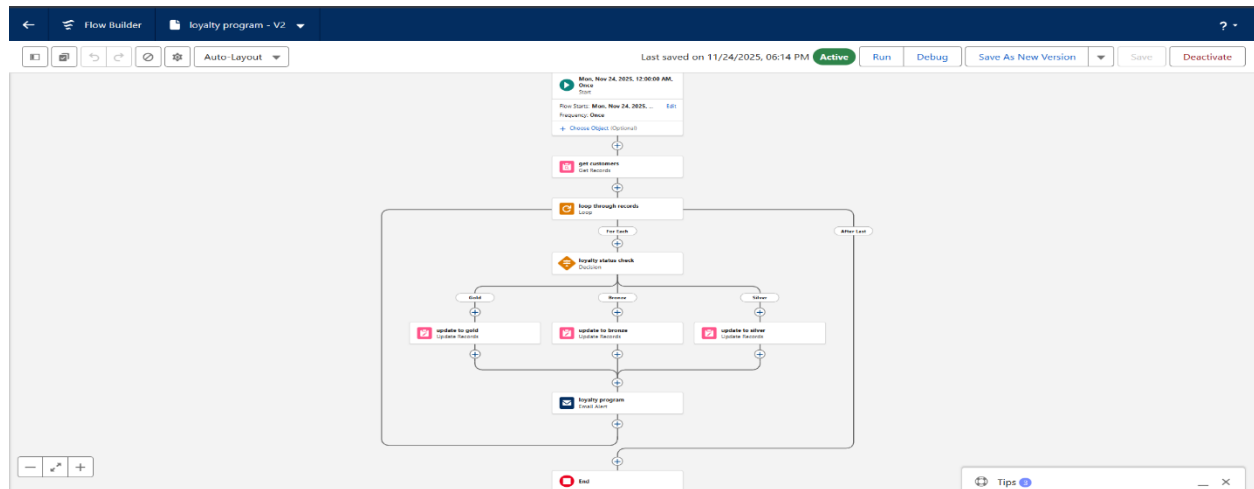
- Full Name (Customer)
- Stock alert flow (Inventory)
  - Automatically shows “Low Stock”, “In Stock”, or “Out of Stock”.



```

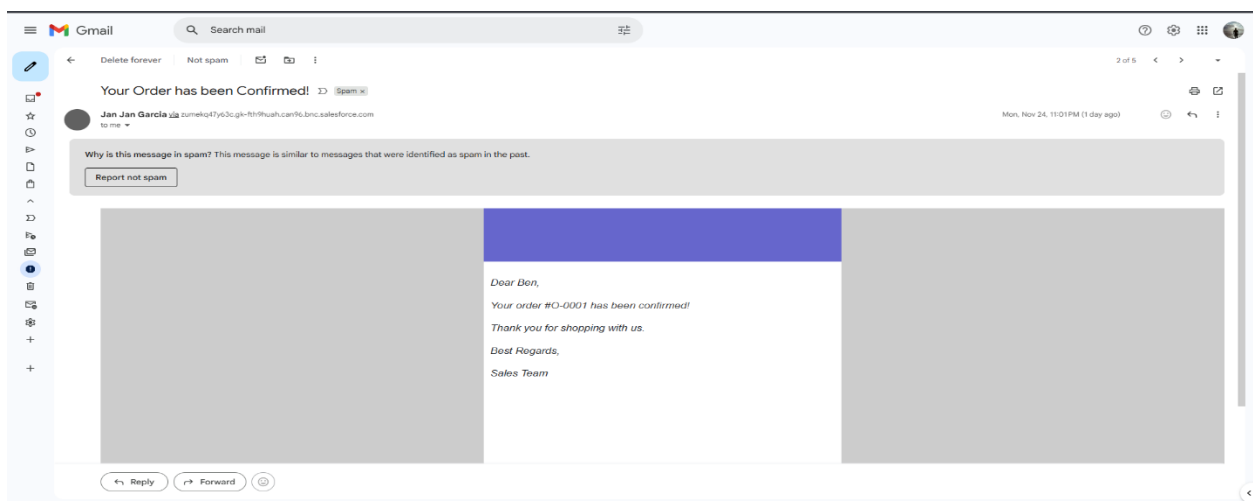
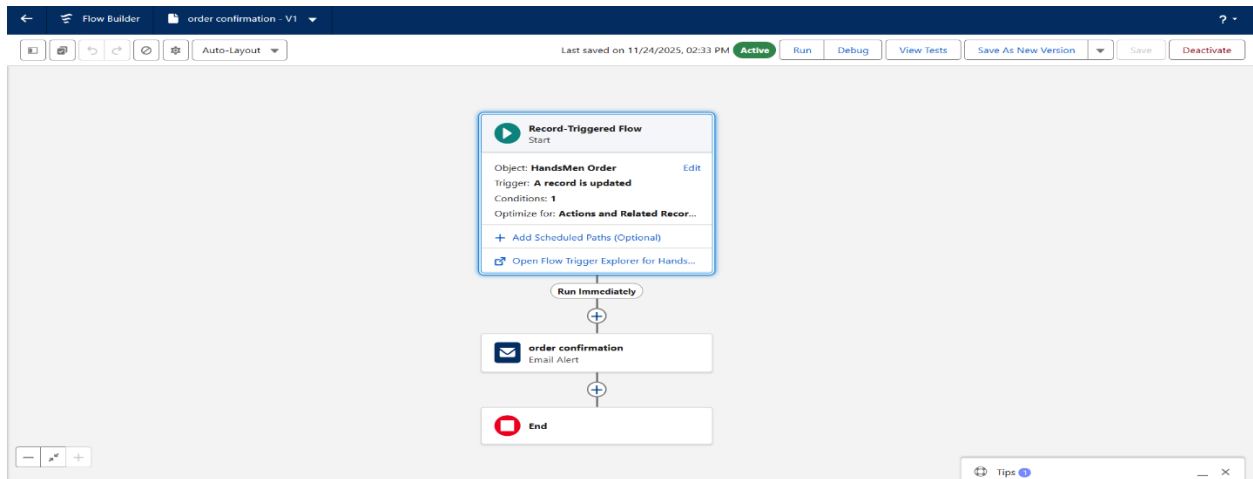
1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
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)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }
  
```

- **Scheduled Flow: Loyalty Update Alert (Inventory)**
  - Loops through customers and updates their loyalty status based from the customer's total purchase.



- **Order Confirmation Flow**

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.

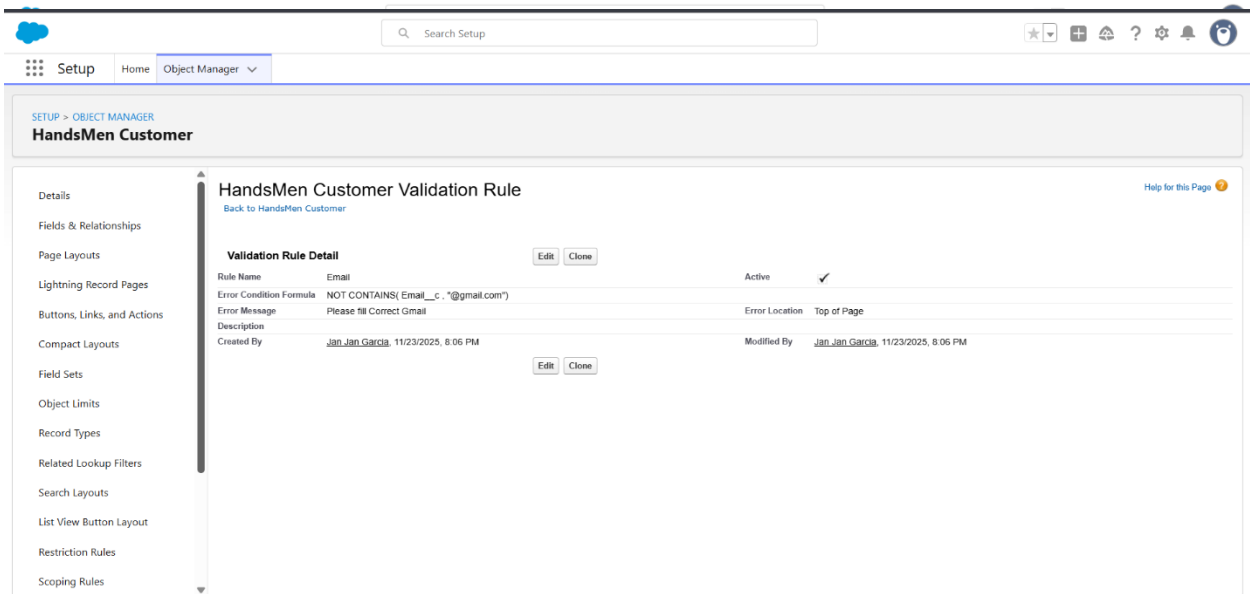


## Validation Rules

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



- Ensure required fields are filled.



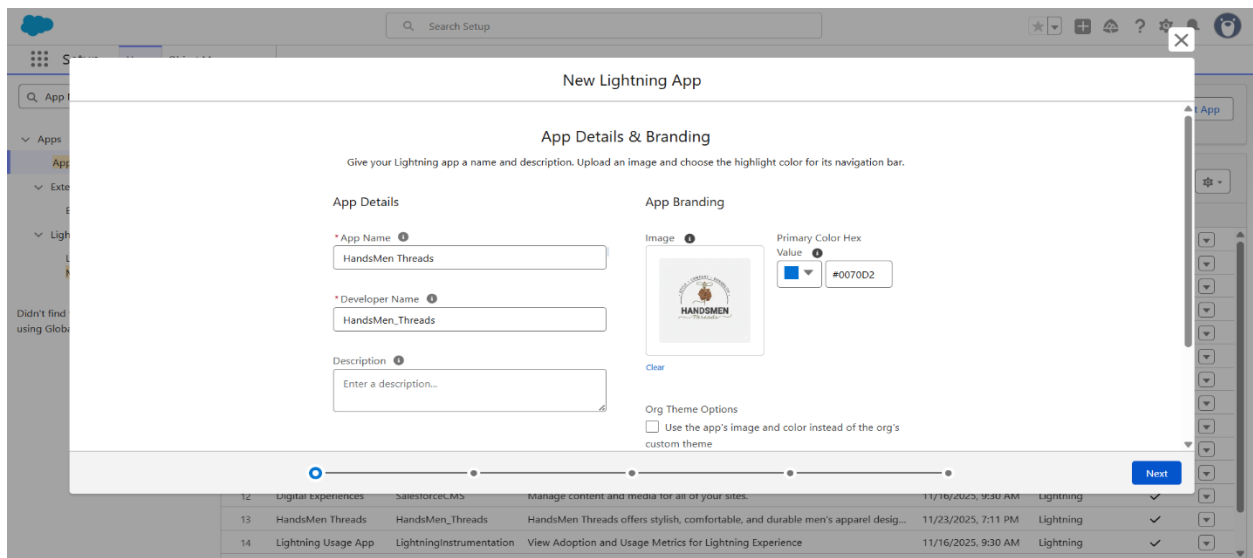
The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' object. The 'Validation Rule' section is active, displaying the 'HandsMen Customer Validation Rule'. The rule is active and has the following details:

Validation Rule Detail		Active	✓
Rule Name	Email		
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

## 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 in Salesforce. The 'App Details & Branding' section is active, and the user is configuring the app 'HandsMen Threads'.

**App Details**

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

**App Branding**

- Image: 
- Primary Color Hex Value: #0070D2
- Org Theme Options: ☐ Use the app's image and color instead of the org's custom theme

The bottom of the screen shows a list of apps with their details and status.

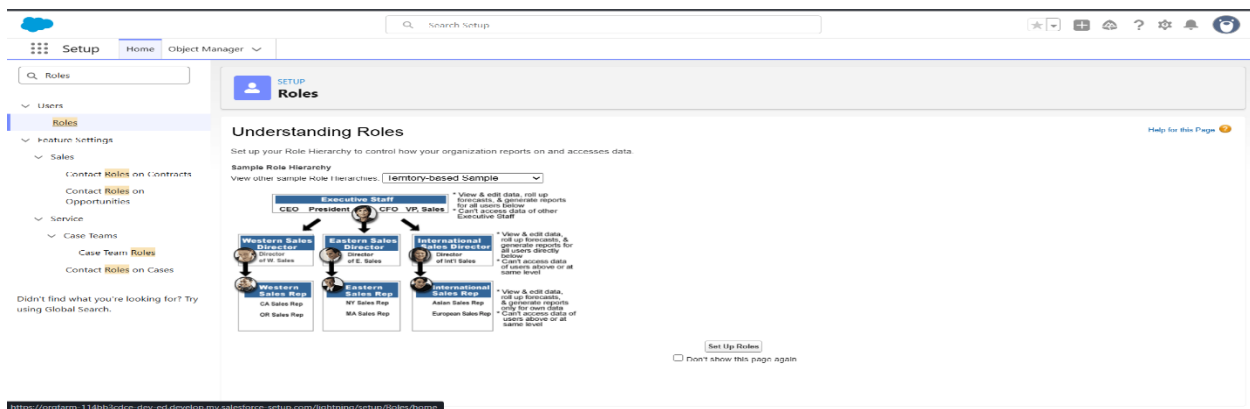
ID	Name	Developer Name	Description	Created By	Created Date	Status
12	Digital experiences	salesforce.com	Manage content and media for all of your sites.		11/16/2025, 9:30 AM	Lightning
13	HandsMen Threads	HandsMen_Threads	HandsMen Threads offers stylish, comfortable, and durable men's apparel design...		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 AWS IAM console 'Profiles' page. The left sidebar contains navigation links for 'Setup', 'Home', 'Object Manager', 'Profiles', and 'Users'. The main content area is titled 'SETUP Profiles' and contains several sections:

- Data Semantic Search Definitions:** A table with checkboxes for 'Data Semantic Search Definitions', 'Data Share Definitions', 'Data Share Sagemaker Connections', 'Data Share Snowflake Connections', and 'Data Share Targets'.
- Work Plans:** A table with checkboxes for 'Work Plans', 'Work Plan Templates', 'Work Step Templates', 'Work Types', and 'Work Type Groups'.
- Custom Object Permissions:** A table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The table lists permissions for 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products'.
- Session Settings:** A section with a dropdown for 'Session Times Out After' (set to '2 hours of inactivity') and a dropdown for 'Session Security Level Required at Login' (set to '--None--').
- Password Policies:** A section with a dropdown for 'User passwords expire in' (set to '90 days'), a dropdown for 'Enforce password history' (set to '3 passwords remembered'), and a dropdown for '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: 500

**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

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 (Change)		
Description			
Created By	Jan Jan Garcia, 11/23/2025, 9:57 PM	Modified By	Jan Jan Garcia, 11/23/2025, 9:57 PM

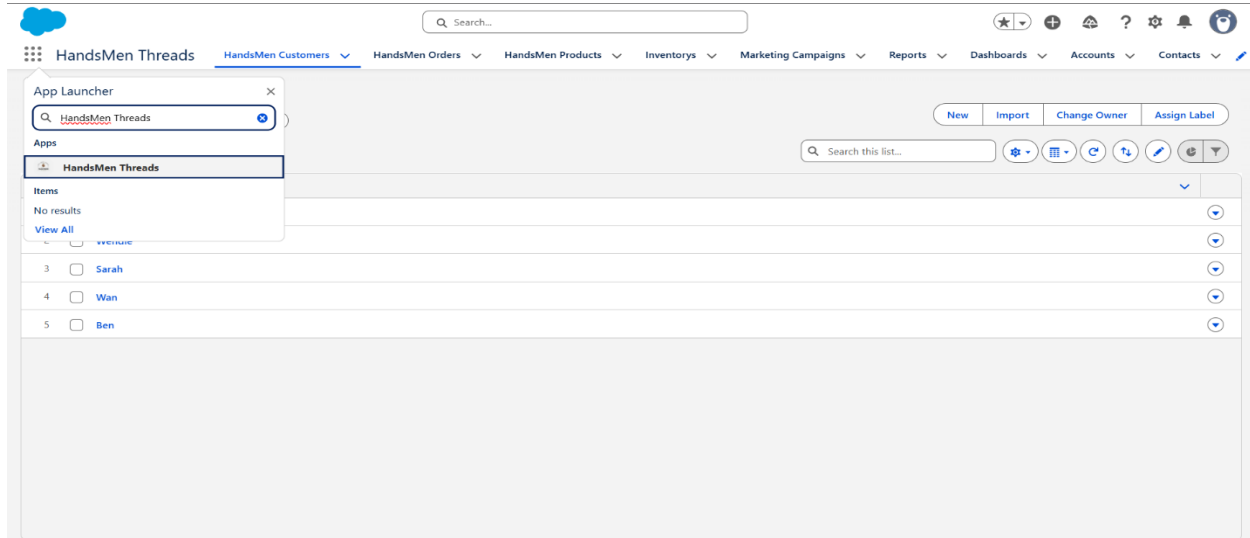
**Email Template**

Subject: Your Order has been Confirmed!

HTML Preview

## Maintenance

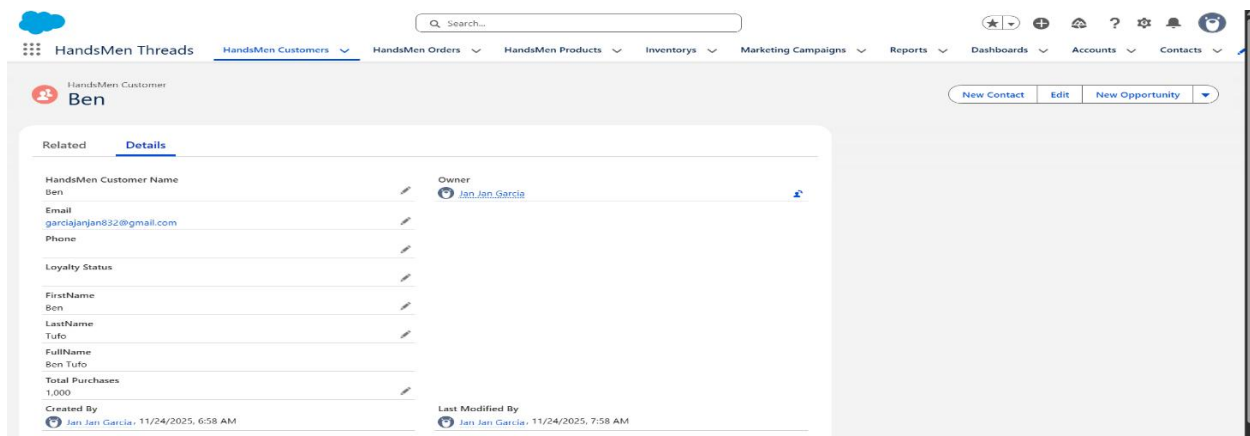
- Regular updates for inventory fields.
- Role and profile audits.
- Ongoing validation rule monitoring.



## Troubleshooting

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

## SCREENSHOTS



**Fig: Custom App for HandsMen Threads**

The image shows a 'New HandsMen Customer' modal form. The background is the 'HandsMen Customers' page with a 'Recently Viewed' list containing 5 items: Ben, John, Wendie, Sarah, and Wan. The modal form has a title bar 'New HandsMen Customer' and a close button. It contains an 'Information' section with the following fields: 'HandsMen Customer Name' (required, with a red asterisk), 'Email', 'Phone', 'Loyalty Status' (dropdown menu with '--None--' selected), 'FirstName', 'LastName', and 'Total Purchases'. To the right of the form, the 'Owner' is listed as 'Jan Jan Garcia'. At the bottom of the modal are three buttons: 'Cancel', 'Save & New', and 'Save'.

Fig: Creation of a New HandsMen Customer

The image shows the 'HandsMen Customers' page. The top navigation bar includes 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The 'HandsMen Customers' section has a 'Recently Viewed' header with a search bar and buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the header is a table with 5 items, each with a checkbox and a customer name.

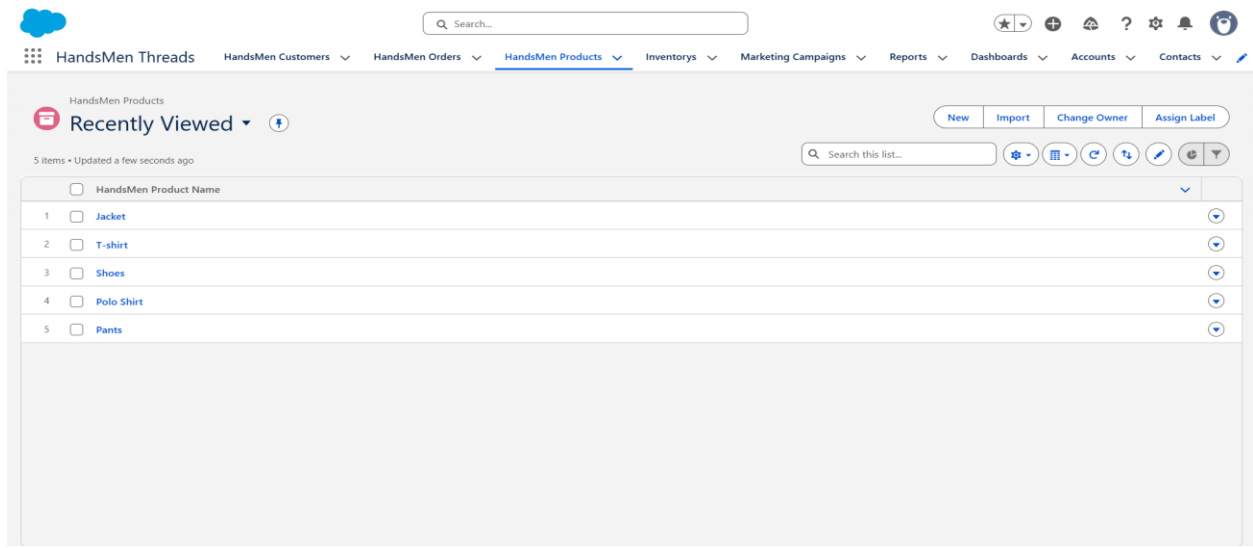
	HandsMen Customer Name	
1	<input type="checkbox"/> Ben	
2	<input type="checkbox"/> John	
3	<input type="checkbox"/> Wendie	
4	<input type="checkbox"/> Sarah	
5	<input type="checkbox"/> Wan	

Fig: HandsMen Customer Name Page

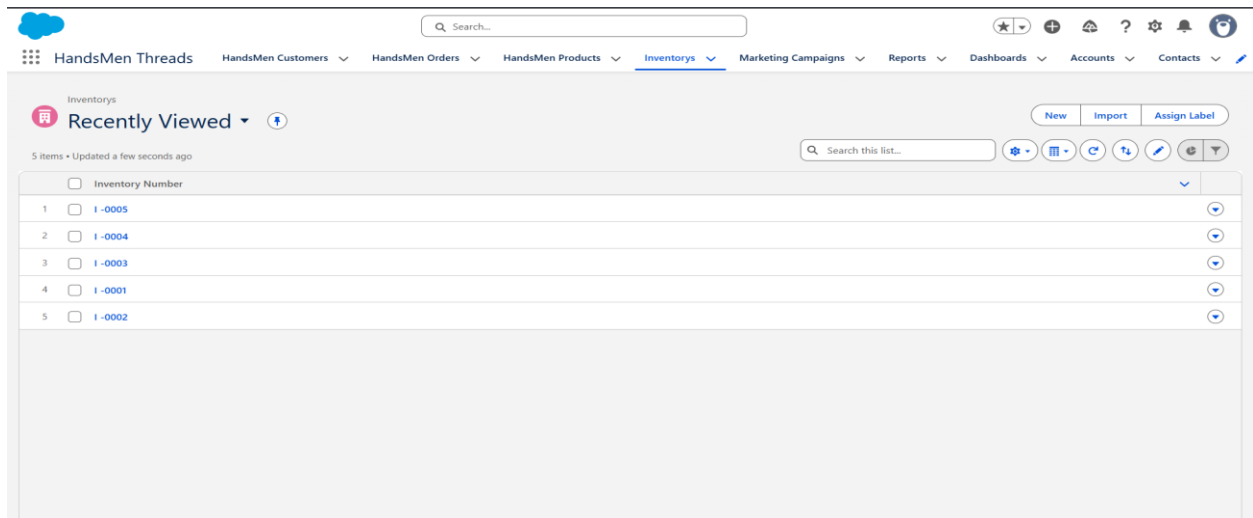
The image shows the 'HandsMen Orders' page. The top navigation bar is the same as the previous page. The 'HandsMen Orders' section has a 'Recently Viewed' header with a search bar and buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the header is a table with 6 items, each with a checkbox and an order number.

	HandsMen OrderNumber	
1	<input type="checkbox"/> O-0006	
2	<input type="checkbox"/> O-0005	
3	<input type="checkbox"/> O-0004	
4	<input type="checkbox"/> O-0001	
5	<input type="checkbox"/> O-0003	
6	<input type="checkbox"/> O-0002	

Fig: HandsMen Orders Page



**Fig: HandsMen Products Page**



**Fig: HandsMen Inventories Page**

## 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.