

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 with the 'Permission Sets' tab selected. The page title is 'Permission Sets'. A sub-header says 'Permission Sets' and provides a brief description: 'On this page you can create, view, and manage permission sets.' Below this is a navigation bar with links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A search bar and filter buttons are also present. The main content area displays a table of permission sets with columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists numerous permission sets, many of which are deprecated. At the bottom, there are pagination controls and a note indicating 1-25 of 97 results.

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"/>	ActorCASCPerfSet		Cloud Integration User
<input type="checkbox"/>	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Agentforce Default Admin	Allows users to build and manage in-org copilot.	Agentforce (Default)
<input type="checkbox"/>	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an auto ...	Agentforce Service Agent User
<input type="checkbox"/>	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

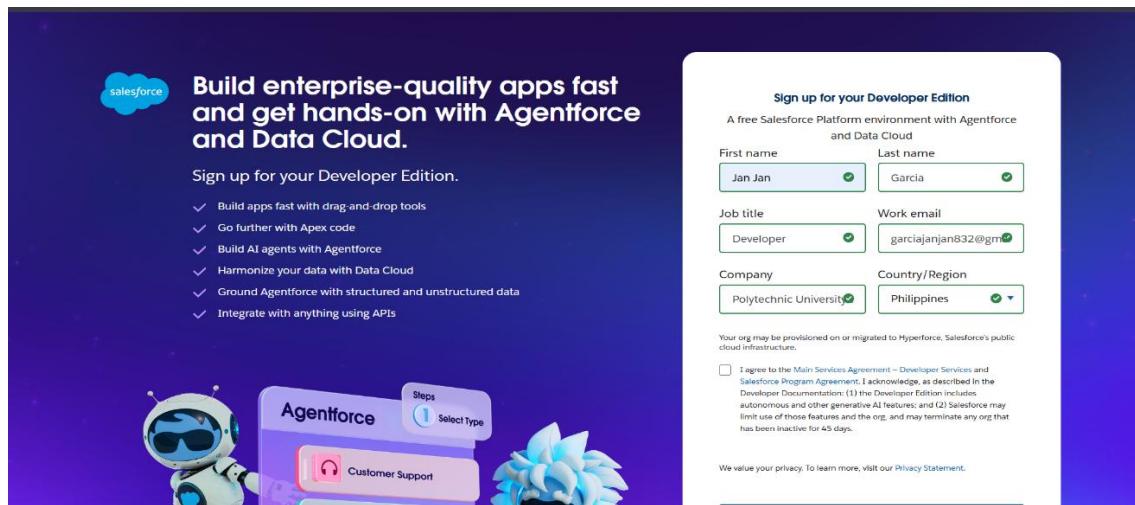
- Testing & Deployment

The screenshot shows the Salesforce Setup Home page. At the top, there's a search bar labeled "Search Setup". Below it, a sidebar on the left lists categories like "Setup Home", "Salesforce Go", "Service Setup Assistant", etc. A main content area features a "Welcome, Jan Jan" message and a section titled "Achieve Popular Business Goals". It includes three cards: "Cross Cloud Connect with Sales Prospects and Customers" (3 Completed, 1 In Progress), "Cross Cloud Track & Manage Customer Data" (2 Completed, 1 In Progress), and "Sales Capture & Auto-Qualify Leads". On the right, a "Setup Menu" is open, showing options like "Setup", "Data Cloud Setup", "Service Setup", "Salesforce Go", and "Developer Console".

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' and 'Object Manager'. Below it is a search bar and a toolbar with various icons. The main area is titled 'Object Manager' and shows a list of 53+ items sorted by Label. The columns in the table are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODI'. The 'TYPE' column shows most entries as 'Standard Object', except for 'Custom Object' which is highlighted in blue. A sidebar on the right has a 'Custom Object' section and a 'Custom Object from Spreadsheet' button.

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:

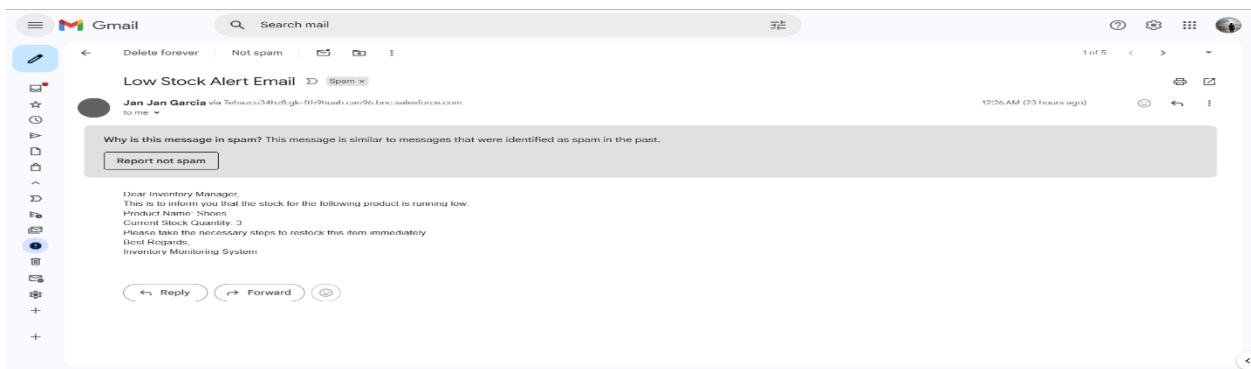
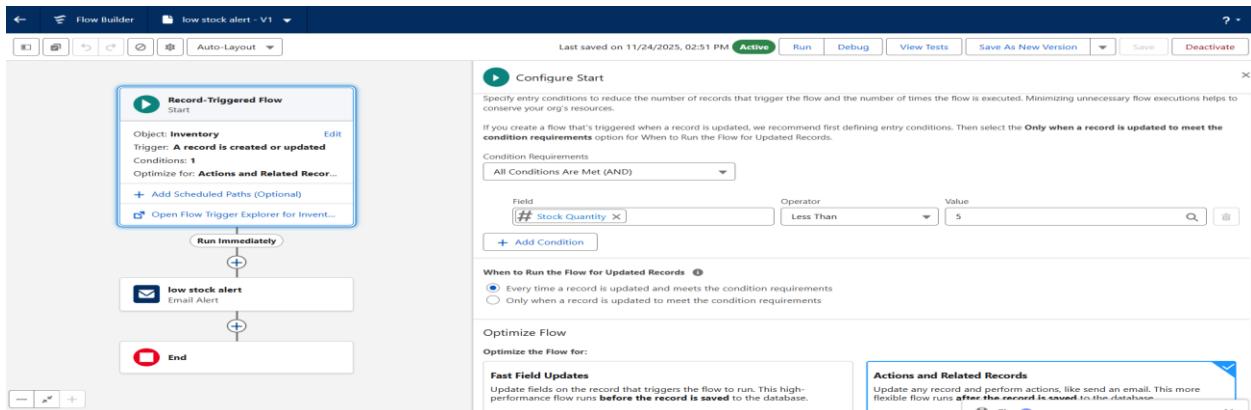
- **Customer:** Email, Phone, Loyalty Status, Full Name (Formula)
- **Product:** SKU, Price, Stock Quantity
- **Order:** Total Amount, Order Date
- **Inventory:** Stock Status (Formula), Restock Needed

Object Relationships

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

Formula Fields

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



```

Developer Console - Google Chrome
File Edit Debug Test Workspace Help
OrderTotalTrigger.apex StockReductionTrigger.apex InventoryBatchJob.apex
Code Coverage: None API Version: 65
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;
            }
        }
    }
}

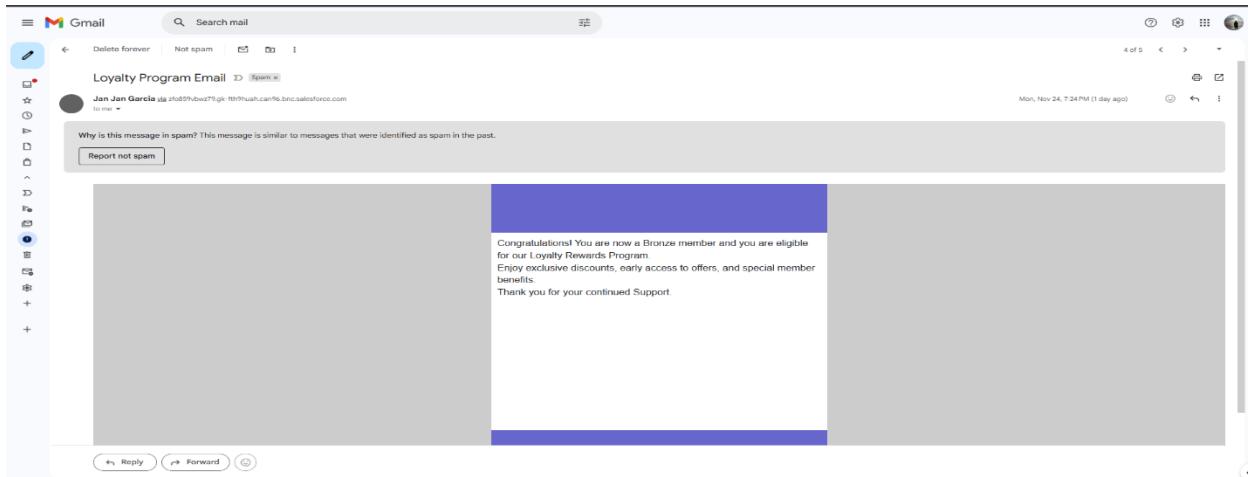
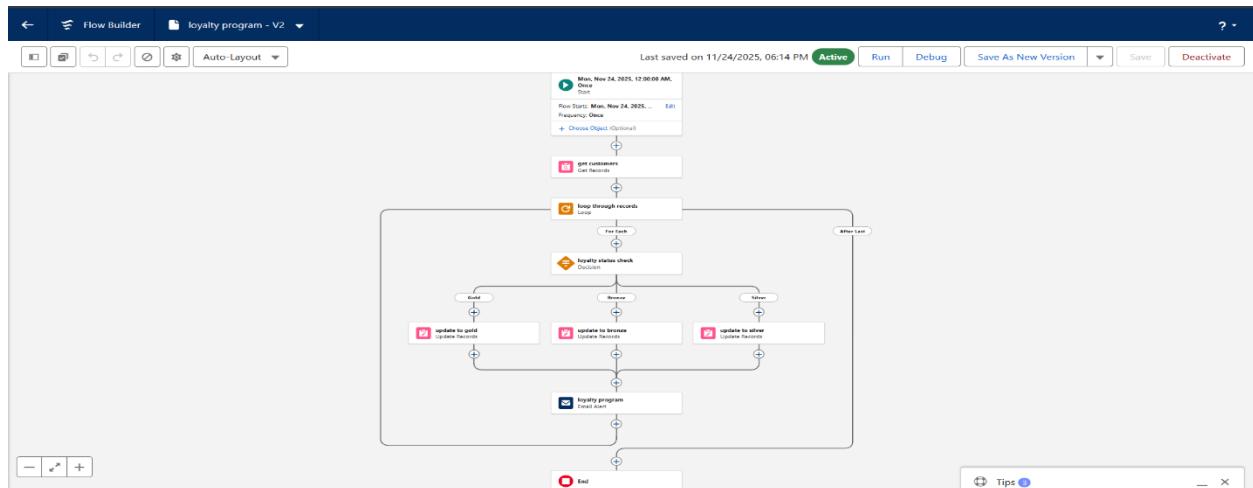
```

Logs Tests Checkpoints Query Editor View Status Progress Problems

User Application Operation Time Status Read Step

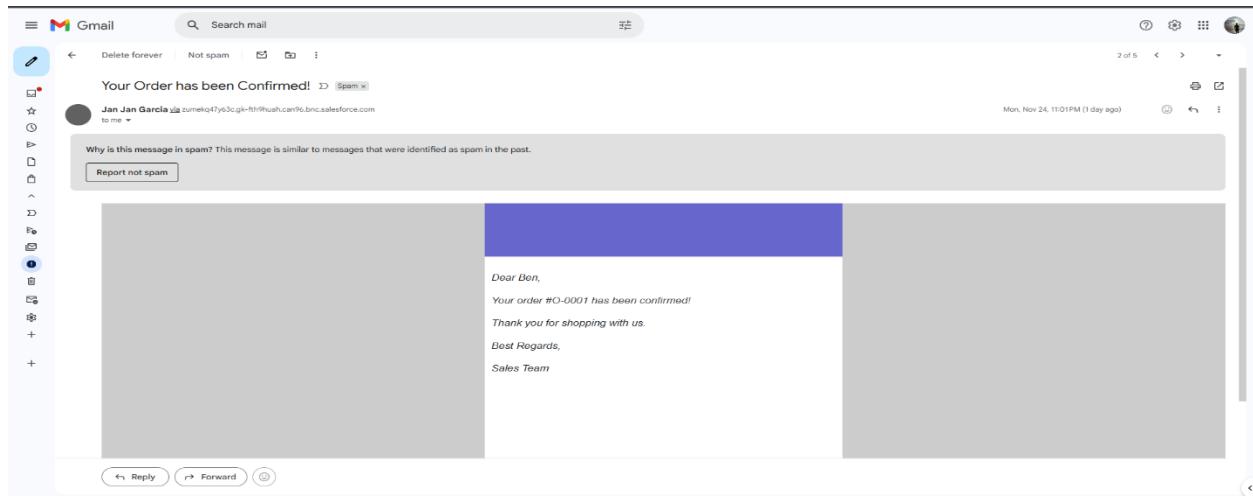
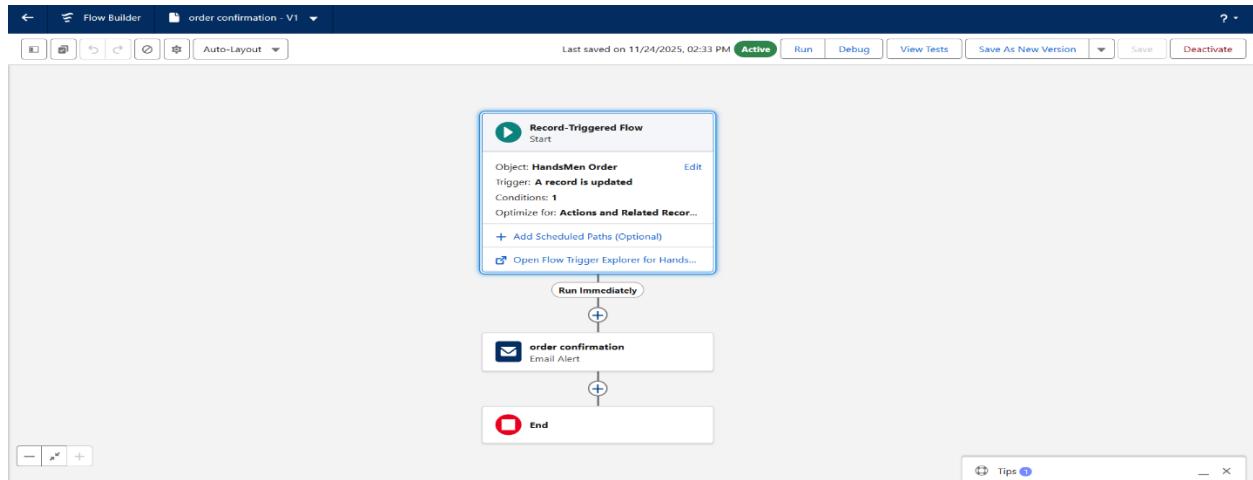
Click here to filter the log list

- **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 under the Object Manager section for the 'HandsMen Customer' object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays the 'Validation Rule Detail' for the 'HandsMen Customer Validation Rule'. The rule is named 'Email' and has the formula 'NOT CONTAINS(Email__c , ".@gmail.com")'. The error message is 'Please fill Correct Gmail'. The rule is active and was created by 'Jan Jan Garcia' on 11/23/2025, 8:06 PM. It was modified by the same user on the same date and time. There are 'Edit' and 'Clone' buttons at the bottom of the rule detail card.

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 the 'App Details & Branding' section, the app name is set to 'HandsMen Threads' and the developer name is 'HandsMen_Threads'. A placeholder for the description is 'Enter a description...'. Under 'App Branding', there is a preview image of the app logo, which is a circular emblem with the word 'HANDSMEN' and some other text. The primary color hex value is set to '#0070D2'. Below this, there is an option to 'Use the app's image and color instead of the org's custom theme'. At the bottom of the screen, a progress bar shows steps 12 through 14, with step 13 currently selected. Step 13 is titled 'Digital Experiences' and 'Salesforce.com' with a note about managing content and media. Step 14 is titled 'Lightning Usage App' and 'LightningInstrumentation' with a note about viewing adoption and usage metrics. A 'Next' button is visible at the bottom right.

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 under the 'Roles' tab. On the left, a sidebar lists various setup categories like Users, Feature Settings, Sales, and Service. The main content area is titled 'Understanding Roles' and displays a 'Sample Role Hierarchy'. The hierarchy is visualized as follows:

- Executive Staff** (CEO, President, CFO, VP, Sales)
 - Can view & edit data, roll up reports for all users below them, and can edit data of other Executive Staff.
- Western Sales Director**, **Eastern Sales Director**, **International Sales Director**
 - Can view & edit data, roll up reports for all users below them, and can edit data of other users at the same level.
- Western Sales Rep** (CA Sales Rep, NY Sales Rep, MA Sales Rep), **Eastern Sales Rep** (NY Sales Rep, MA Sales Rep), **International Sales Rep** (Asian Sales Rep, European Sales Rep)
 - Can view & edit data, roll up reports for all users below them, and can edit data of users above or at the same level.

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

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:

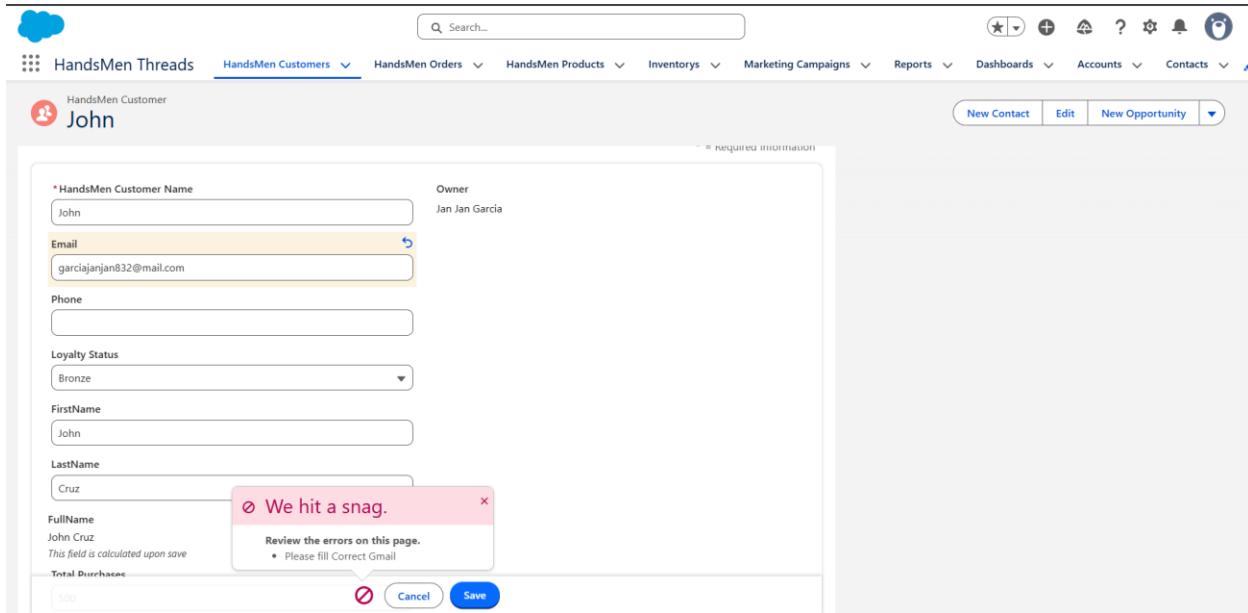
- Sales: Full access to Customers and Orders
- Inventory: Read/Edit access to Products and Inventory
- Marketing: Access to Campaigns

The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'Profiles' and contains sections for 'Data Semantic Search Definitions', 'Data Share Definitions', 'Data Share SageMaker Connections', 'Data Share Snowflake Connections', and 'Data Share Targets'. Below these is a 'Custom Object Permissions' section for three custom objects: 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products'. Each object has a grid of permissions for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). To the right, there are sections for 'Work Plans', 'Work Plan Templates', 'Work Step Templates', 'Work Types', and 'Work Type Groups', each with their own permission grids. 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). A sidebar on the left shows navigation links for 'Setup', 'Home', 'Object Manager', and 'Profiles'.

Test Cases

Examples include:

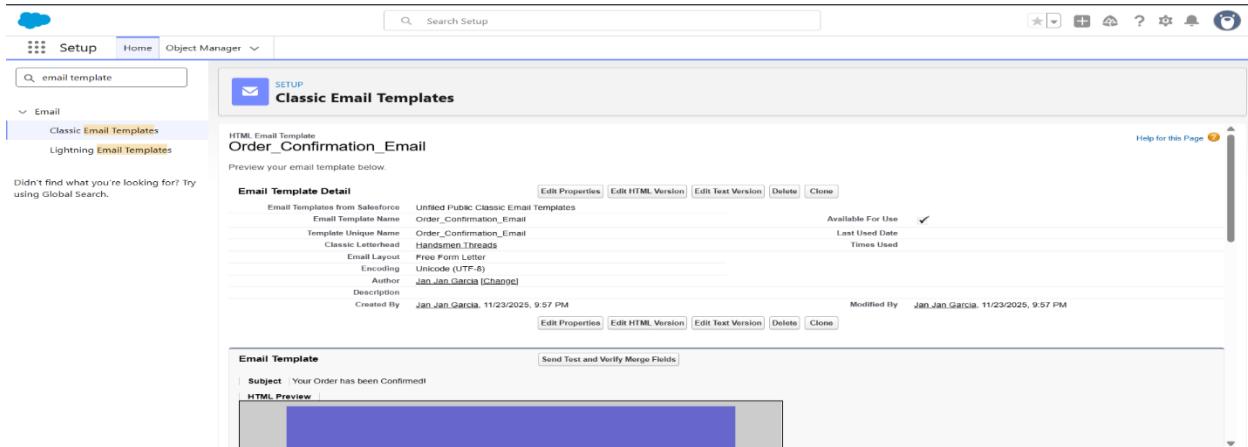
- Customer creation (valid/invalid email).
- Order creation with total amount validation.
- Product creation with required field checks.
- Inventory stock status formula test.



Phase 5: Deployment, Documentation & Maintenance

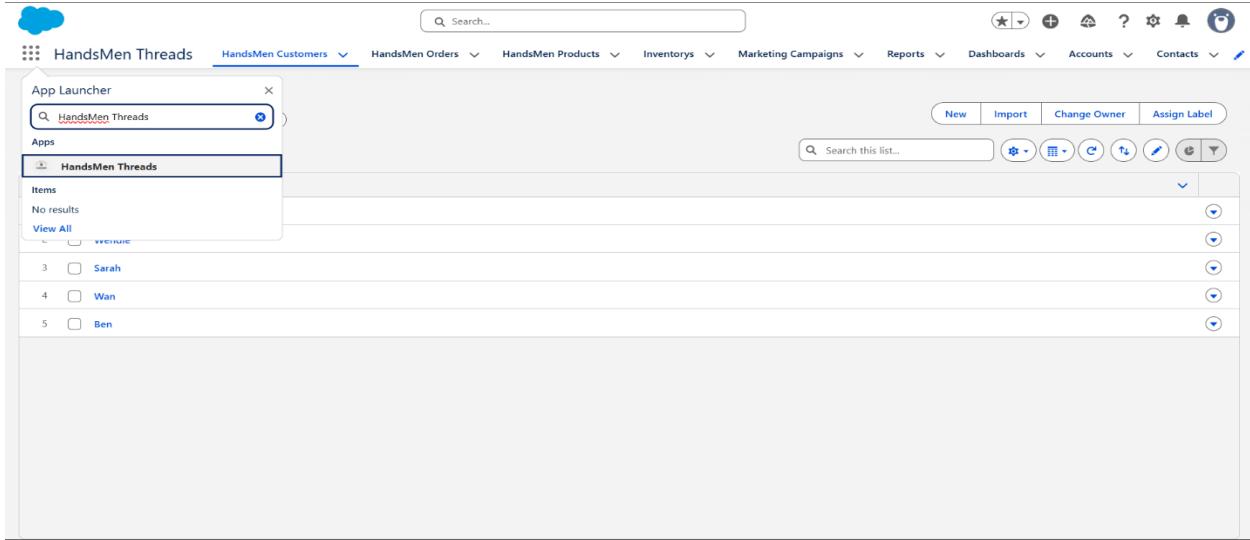
Deployment Strategy

- 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.

SCREENSHOTS

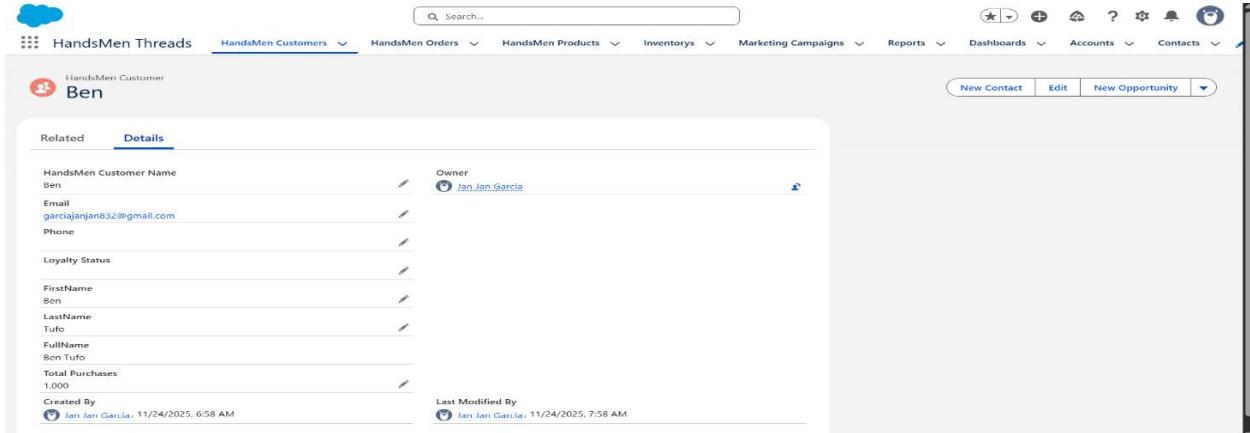


Fig: Custom App for HandsMen Threads

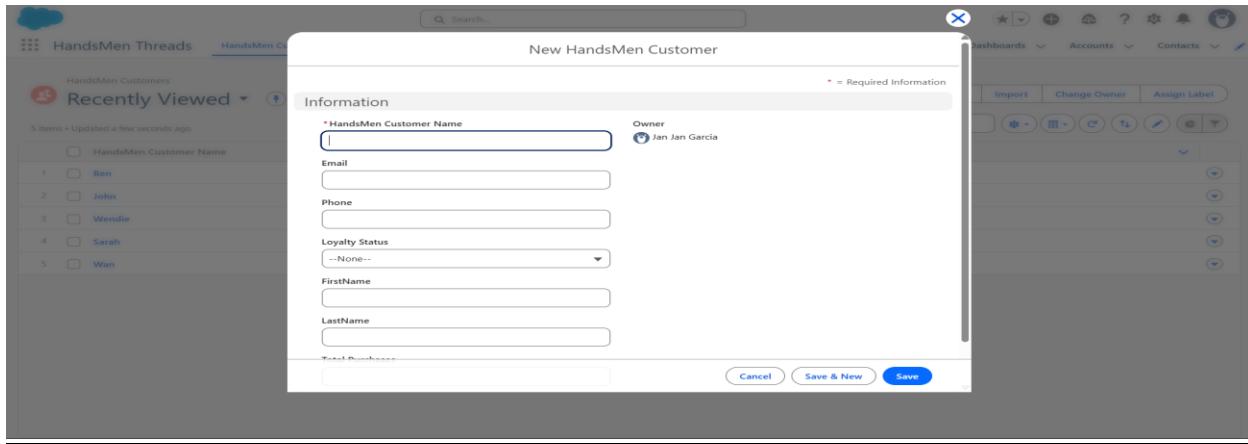


Fig: Creation of a New HandsMen Customer

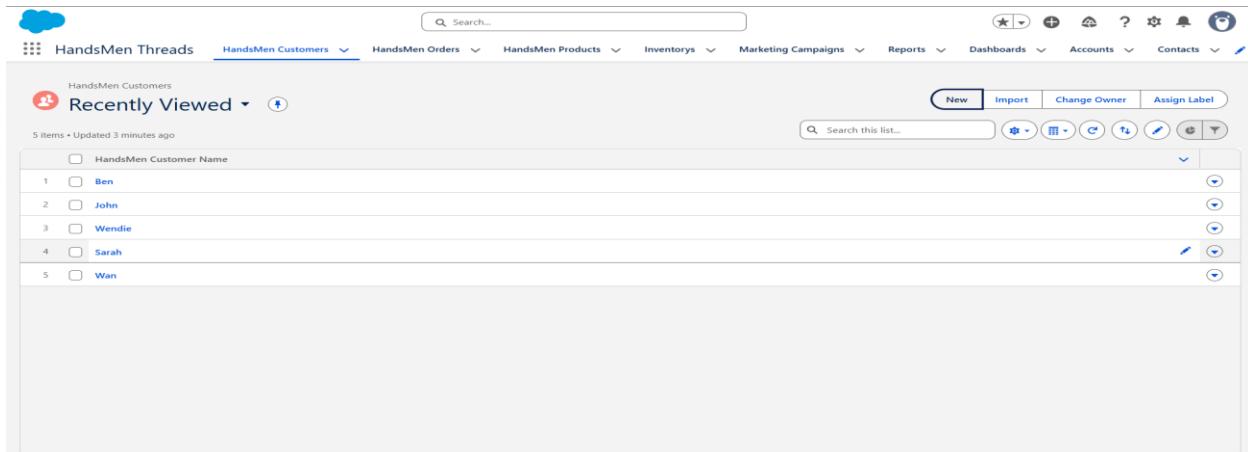


Fig: HandsMen Customer Name Page

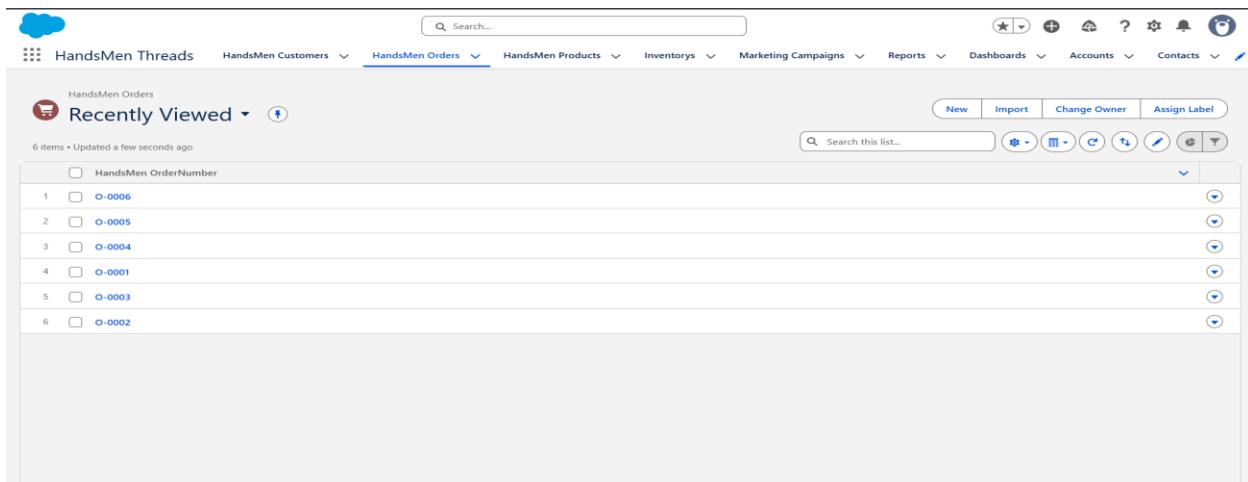


Fig: HandsMen Orders Page

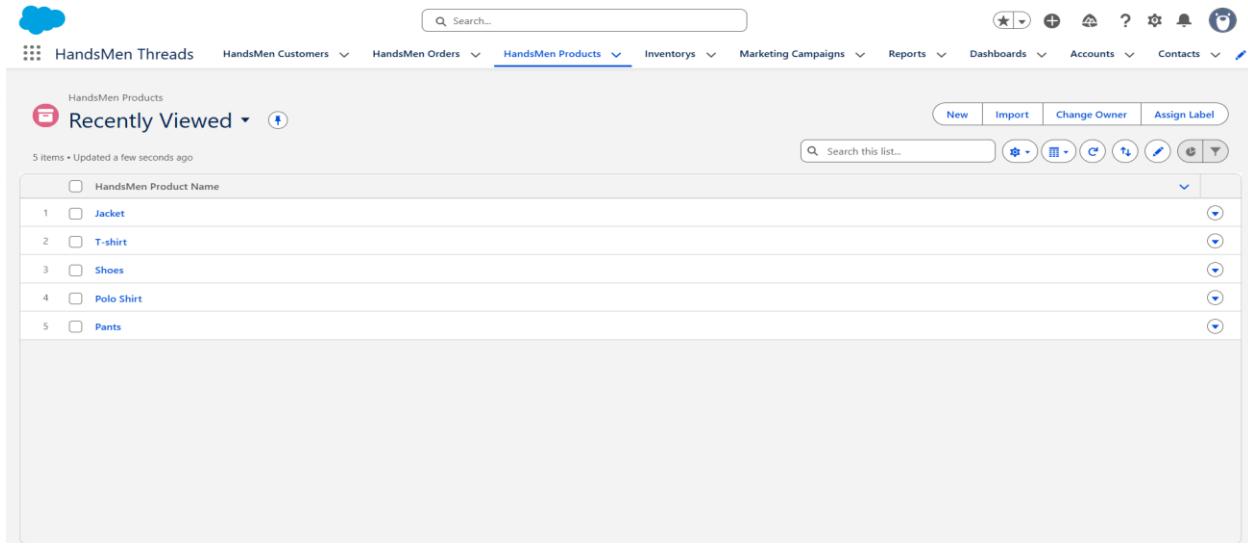


Fig: HandsMen Products Page

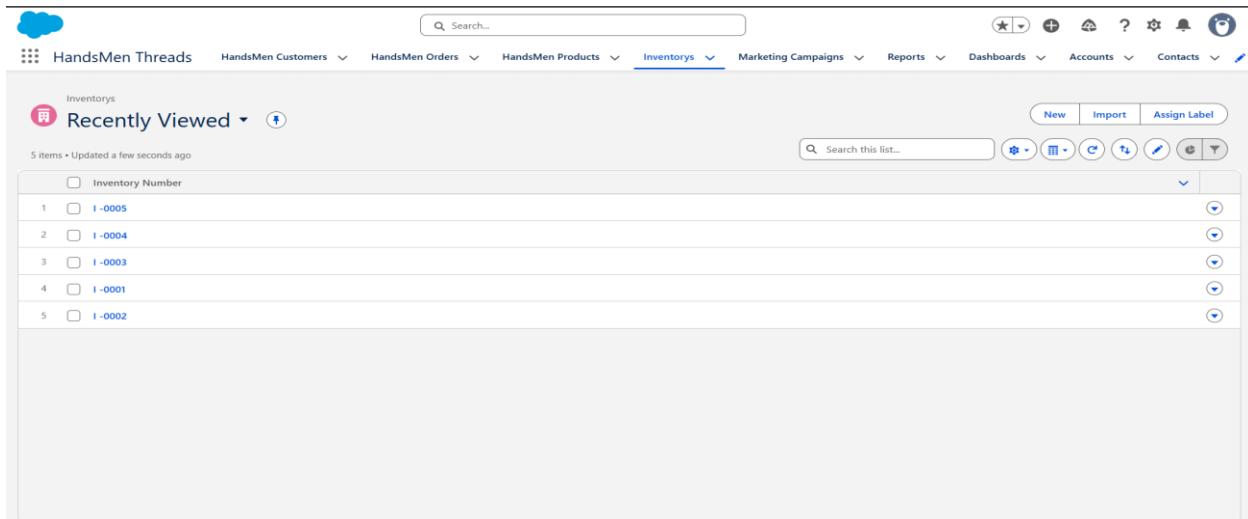


Fig: HandsMen Inventorys Page

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.