

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 'Users' dropdown. 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. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists 15 permission sets, including legacy ones and newer ones like 'Agentforce Service Agent Secure Base'. The bottom of the table shows '1-25 of 97' items and '0 Selected'.

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 admin ...	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	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 copilots.	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

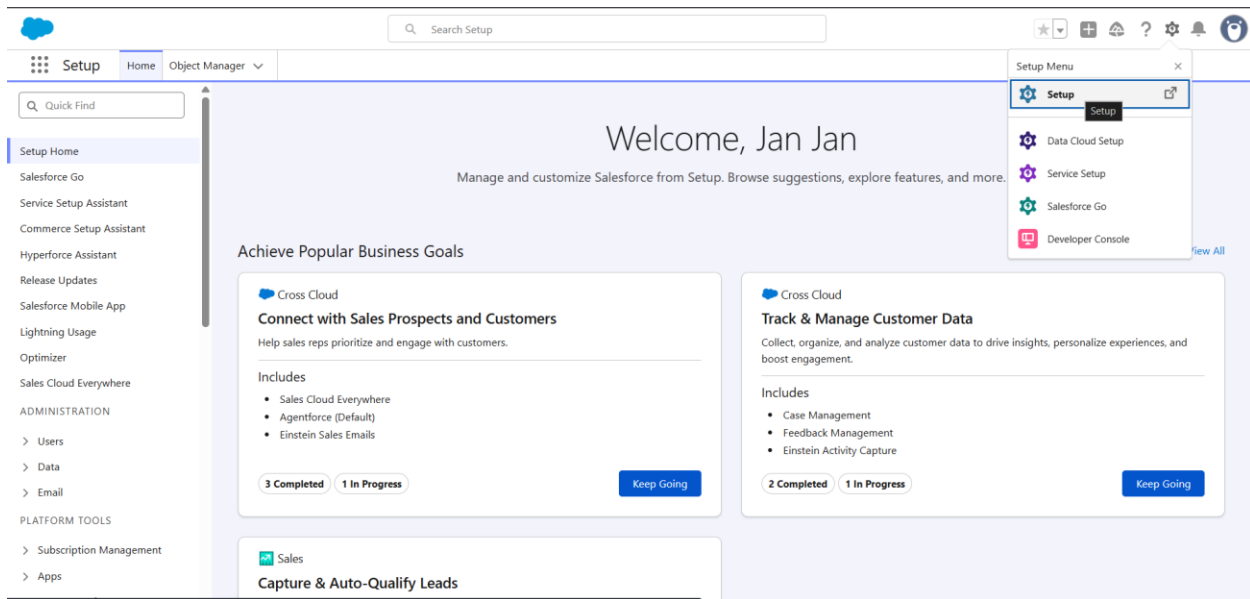
Stakeholder Mapping

- **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

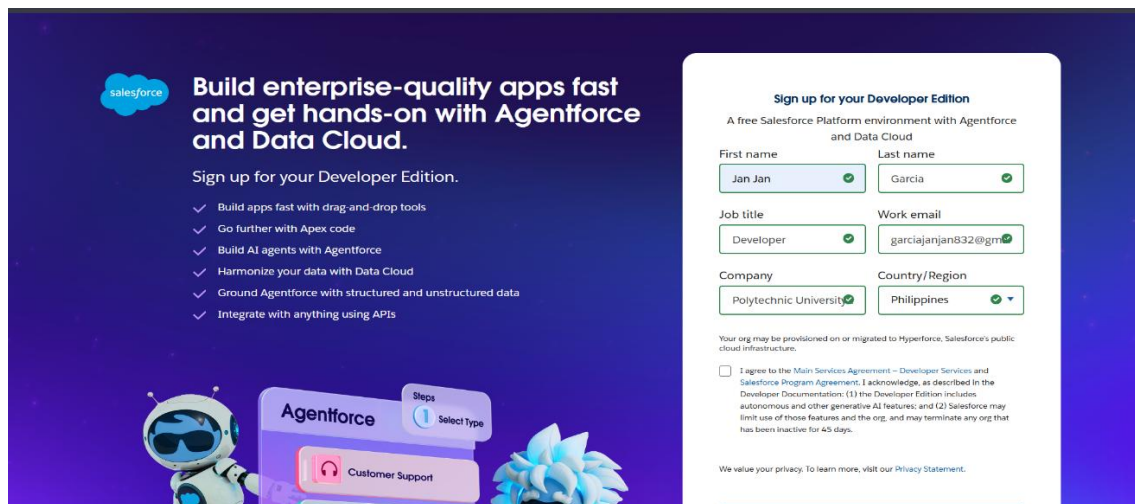
- Testing & Deployment



Phase 2: Salesforce Development – Backend & Configurations

Setup Environment

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

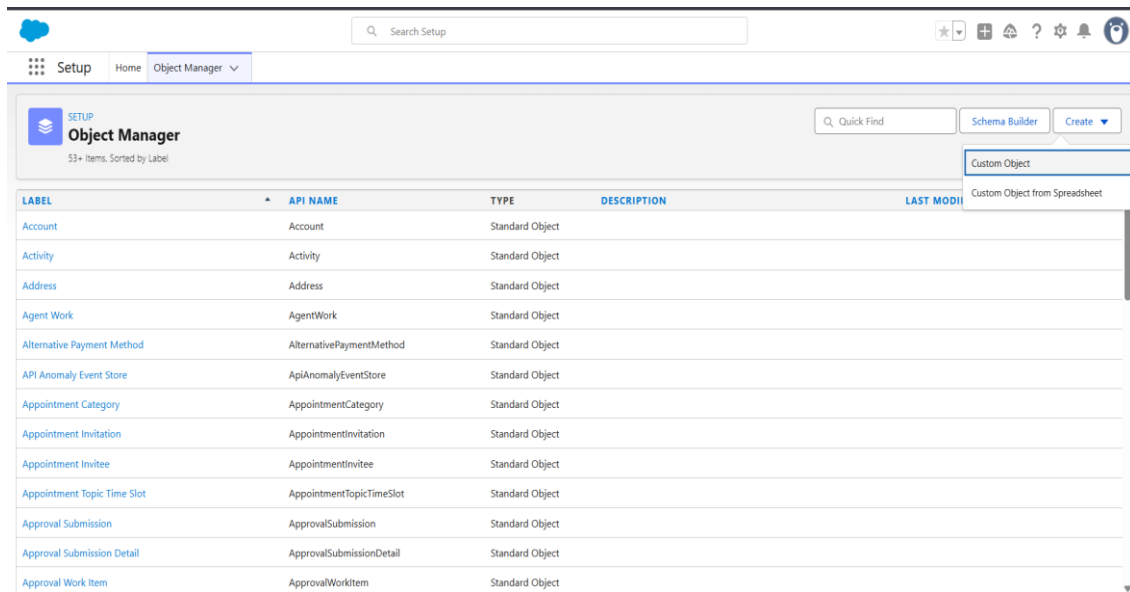


Customization of Objects, Fields & Tabs

Custom Objects Created

- Handsman Customer

- Handsman Product
- Handsman Order
- Inventory
- Marketing Campaign



The screenshot shows the Salesforce 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.

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”.

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is visible with the following steps: 1. 'Record-Triggered Flow' (Start) with Object: Inventory, Trigger: A record is created or updated, and Conditions: 1. 2. 'Run Immediately' connector. 3. 'low stock alert' (Email Alert). 4. 'End' connector. On the right, the 'Configure Start' panel is open. It shows the condition requirements as 'All Conditions Are Met (AND)'. The field is '# Stock Quantity', the operator is 'Less Than', and the value is '5'. Below this, the 'When to Run the Flow for Updated Records' section has the option 'Every time a record is updated and meets the condition requirements' selected. The 'Optimize Flow' section has 'Fast Field Updates' selected. A 'Tips' box at the bottom right states: 'Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.'

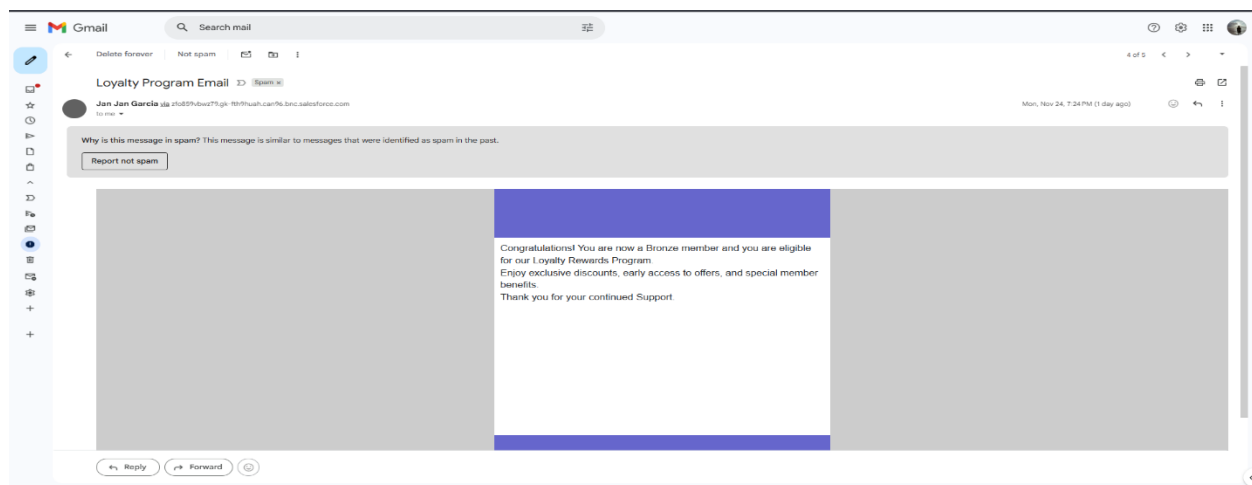
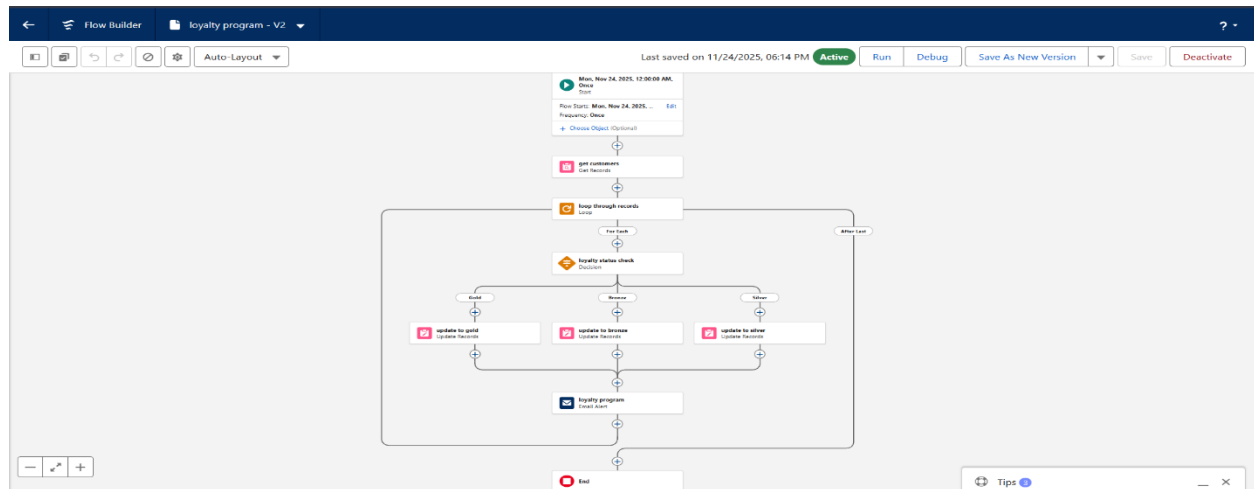
The screenshot shows a Gmail inbox. The selected email is titled 'Low Stock Alert Email' and is marked as 'Spam'. The sender is 'Jan Jan Garcia' with the email address 'jan.jan.garcia@salesforce.com'. The email body contains the following text: 'Dear Inventory Manager, This is to inform you that the stock for the following product is running low. Product Name: Shoes. Current Stock Quantity: 3. Please take the necessary steps to restock this item immediately. Best Regards, Inventory Monitoring System'. Below the email body are buttons for 'Reply', 'Forward', and 'Report not spam'.

The screenshot shows the Salesforce Developer Console with the Apex code for the 'OrderTotalTrigger.apex' class. The code is as follows:

```
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 }
```

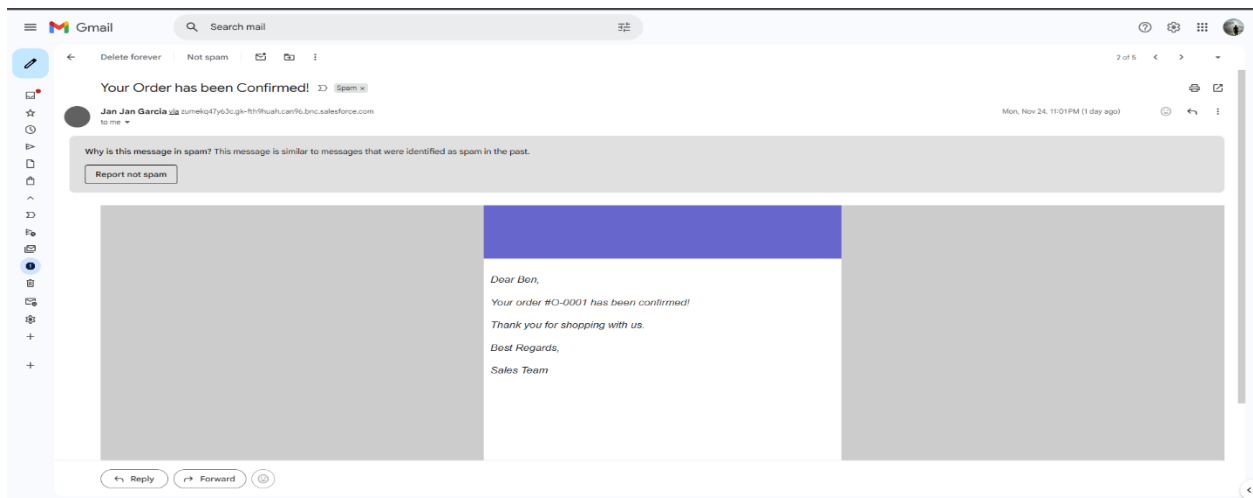
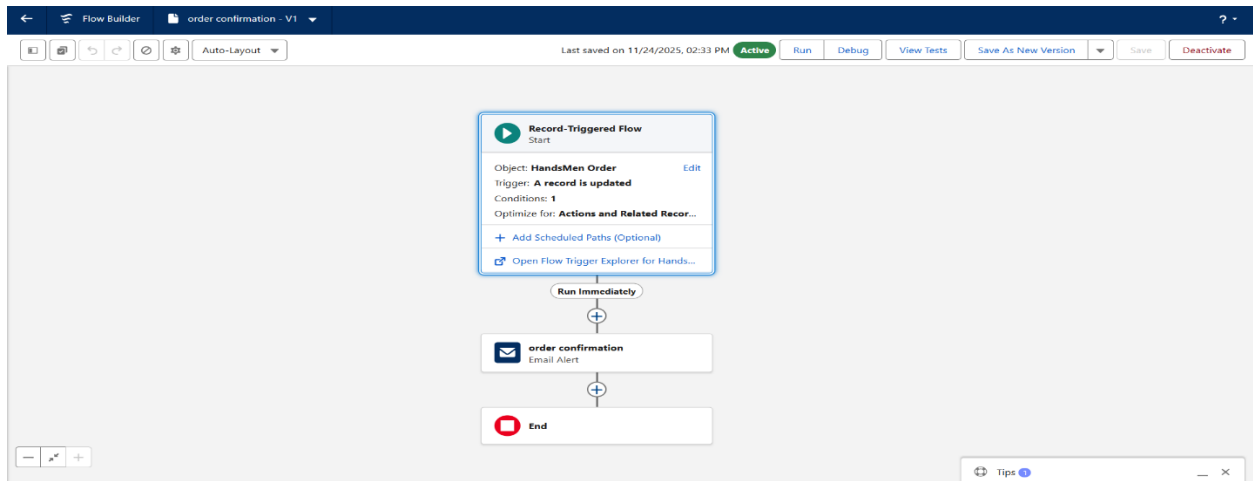
 The console also shows a table with columns: User, Application, Operation, Time, Status, Read, and Size.

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



- **Order Confirmation Flow**

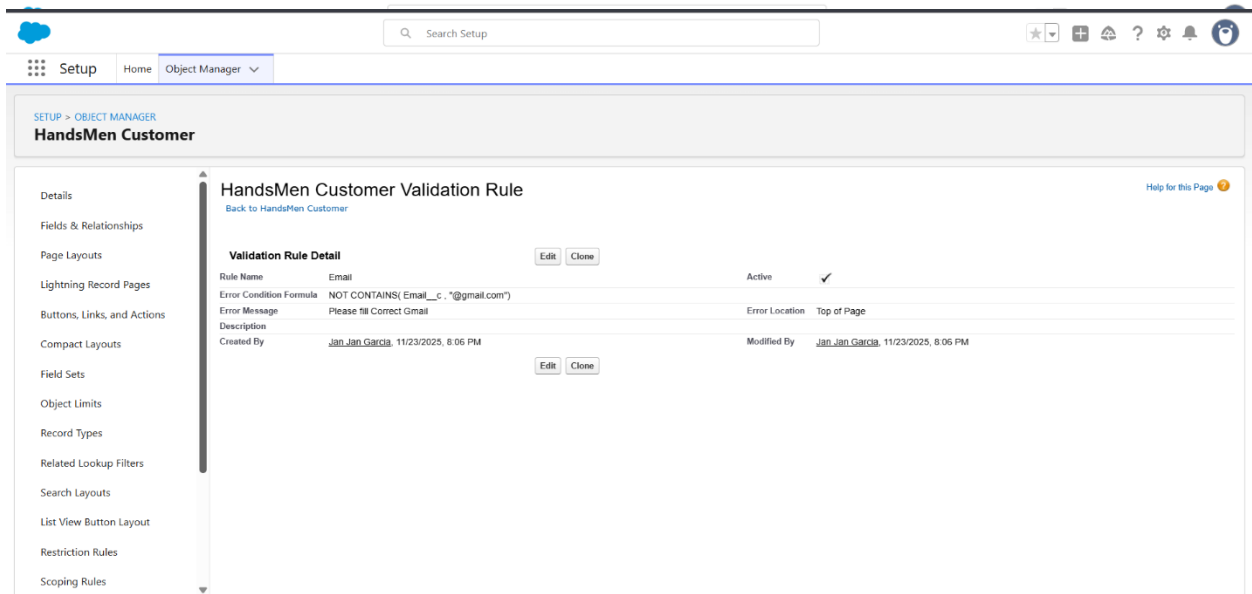
- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



Validation Rules

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

- Ensure required fields are filled.



Setup > OBJECT MANAGER
HandsMen Customer

HandsMen Customer Validation Rule
[Back to HandsMen Customer](#)

Validation Rule Detail [Edit](#) [Clone](#)

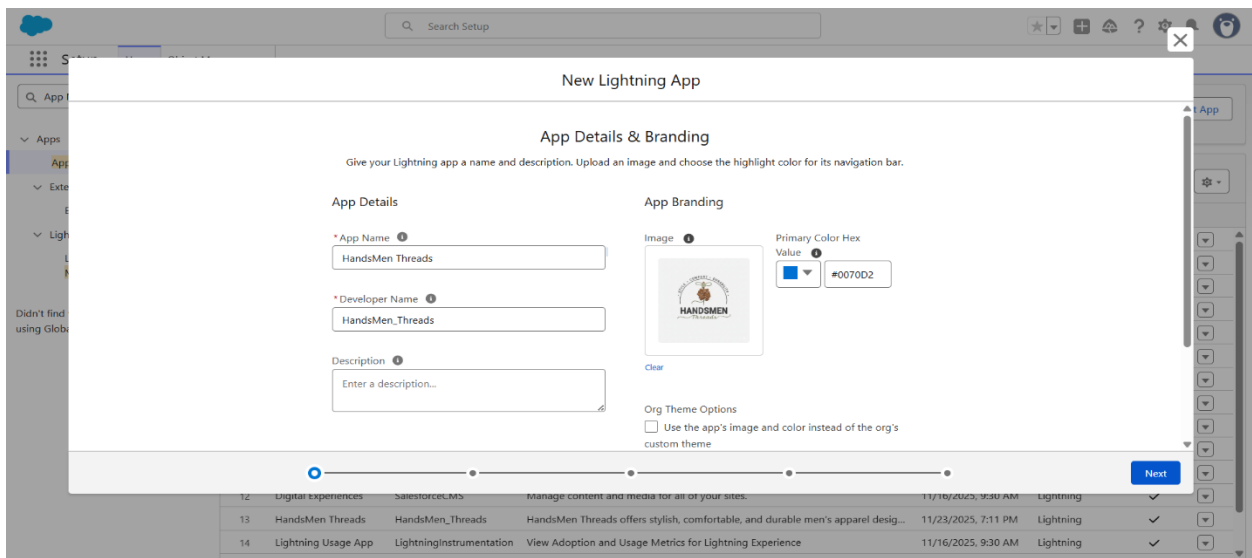
Rule Name	Email	Active	✓
Error Condition Formula	NOT CONTAINS(Email__c, "@gmail.com")		
Error Message	Please fill Correct Gmail	Error Location	Top of Page
Description			
Created By	Jan Jan Garcia, 11/23/2025, 8:06 PM	Modified By	Jan Jan Garcia, 11/23/2025, 8:06 PM

[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



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](#)

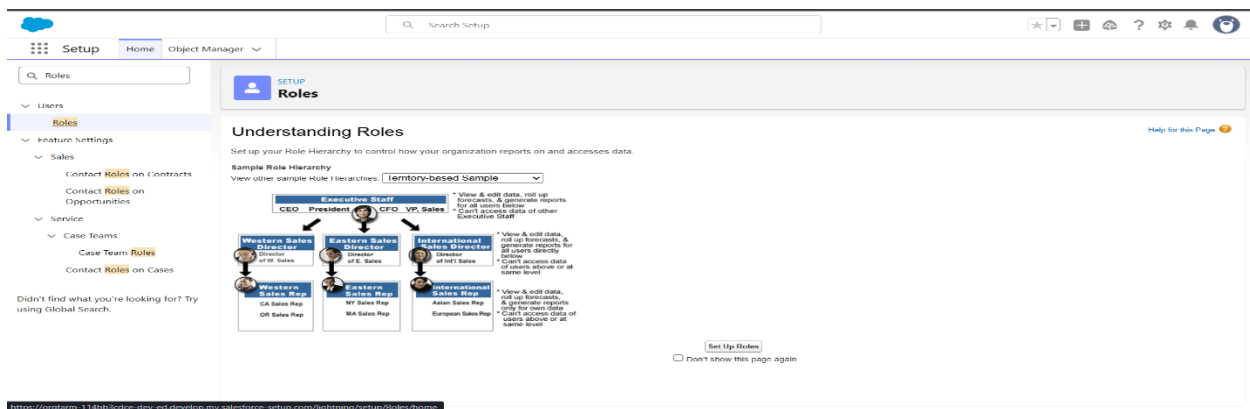
ID	Name	Object	Description	Created	App	Theme
12	Digital experiences	salesforce.com	Manage content and media for all of your sites.	11/16/2025, 9:30 AM	Lightning	✓
13	HandsMen Threads	HandsMen_Threads	HandsMen Threads offers stylish, comfortable, and durable men's apparel design...	11/23/2025, 7:11 PM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

Profiles

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Data Semantic Search Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Sagemaker Connections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Snowflake Connections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Targets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Work Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HandsMen Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HandsMen Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

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 the 'HandsMen Customer' form for a user named John. The form includes fields for Name, Email, Phone, Loyalty Status, First Name, Last Name, and Full Name. A validation error message is displayed: 'We hit a snag. Review the errors on this page. Please fill Correct Gmail'. The error is associated with the Email field, which contains 'garciajan832@mail.com'. The form also shows the Owner as 'Jan Jan Garcia' and the Total Purchases as '500'.

Phase 5: Deployment, Documentation & Maintenance

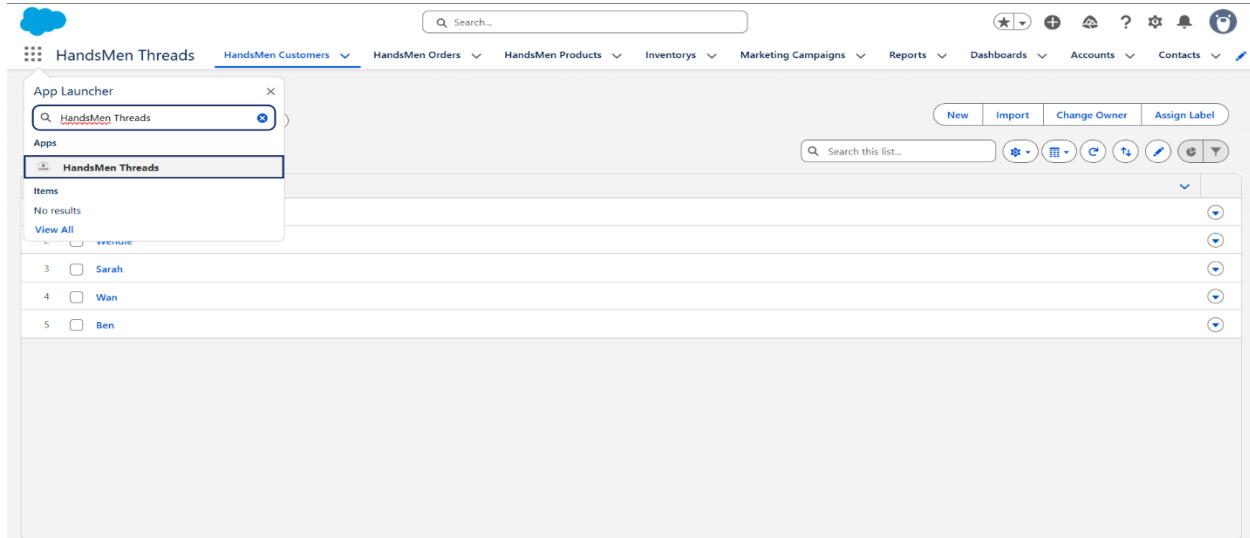
Deployment Strategy

- Change Sets recommended for migrating components into a production environment.
- Includes: Objects, Fields, Validation Rules, Profiles, Roles, Permission Sets, Email Templates.

The screenshot shows the Salesforce Setup page for 'Classic Email Templates'. The page displays the details for an email template named 'Order_Confirmation_Email'. The details include the template name, unique name, classic letterhead, email layout, encoding, author, description, and creation/modification dates. The template is marked as 'Available For Use'. The subject line is 'Your Order has been Confirmed!'. The HTML preview is partially visible below.

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

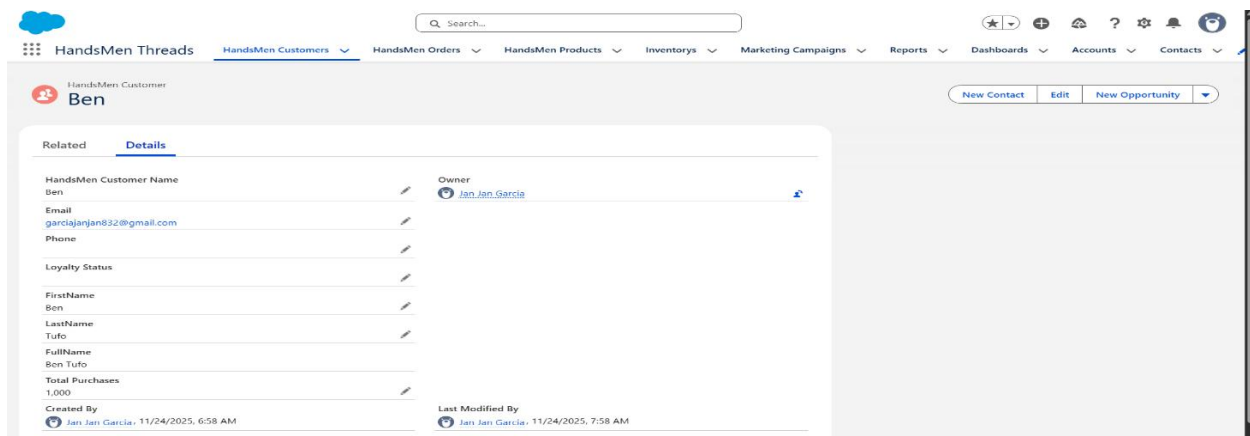


Fig: Custom App for HandsMen Threads

New HandsMen Customer

* Required Information

HandsMen Customer Name

Email

Phone

Loyalty Status

FirstName

LastName

First Purchase

Owner: Jan Jan Garcia

Cancel Save & New Save

Fig: Creation of a New HandsMen Customer

HandsMen Customers

Recently Viewed

5 items • Updated a few seconds ago

Search this list...

	HandsMen Customer Name	
1	Ben	
2	John	
3	Wendie	
4	Sarah	
5	Wan	

Fig: HandsMen Customer Name Page

HandsMen Orders

Recently Viewed

6 items • Updated a few seconds ago

Search this list...

	HandsMen OrderNumber	
1	0-0006	
2	0-0005	
3	0-0004	
4	0-0001	
5	0-0003	
6	0-0002	

Fig: HandsMen Orders Page

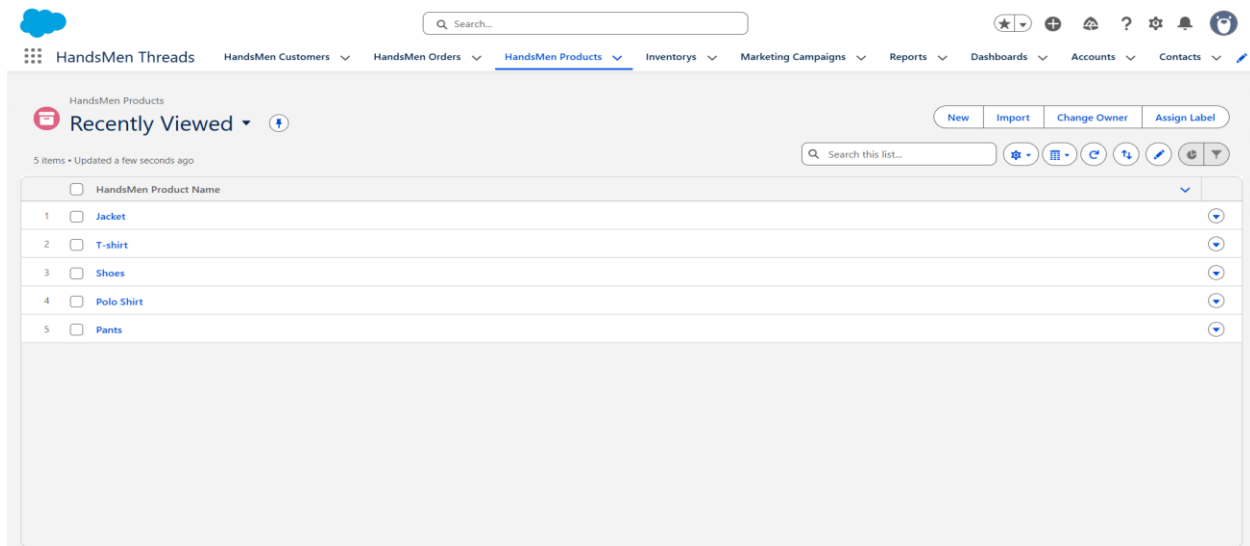


Fig: HandsMen Products Page

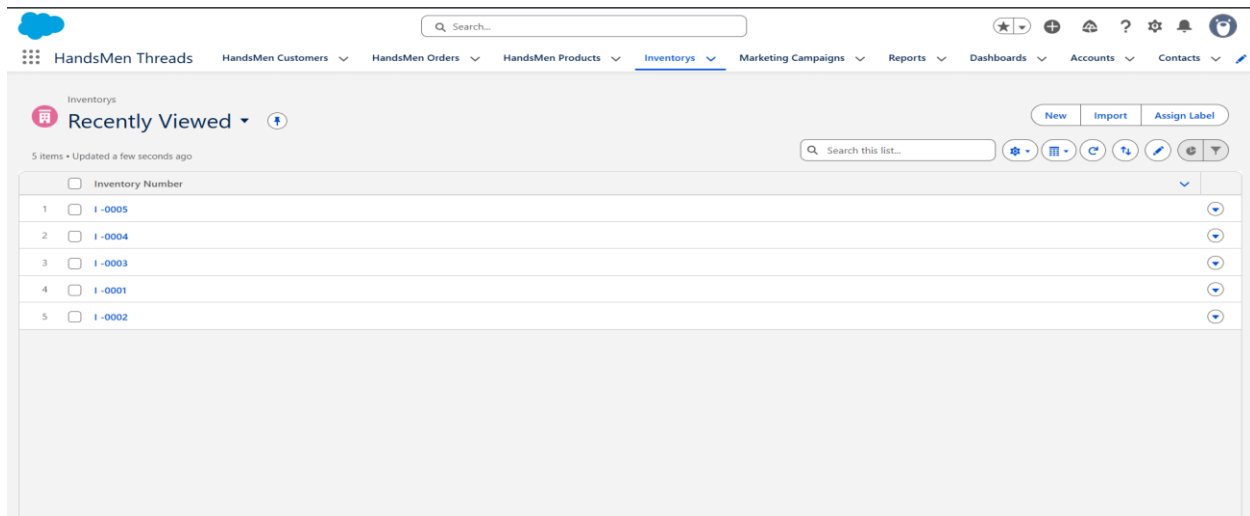


Fig: HandsMen Inventories Page

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.