

Bulacan State University
College of Information and Communications Technology
Bachelor of Science in Information Technology

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

Documented by:

Miranda, Lheriza A.

BSIT 3E – G1

Capstone Project Documentation

**Submitted in partial fulfillment of the requirements for completing the
Capstone Project**

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

Project Overview

The HandsMen Threads Salesforce CRM project aims to streamline data management and enhance customer relations in the fashion industry. It features a robust data model that ensures accurate and consistent information, automated order confirmations, a dynamic loyalty program that rewards repeat customers, proactive stock alerts for timely restocking, and scheduled bulk order updates to maintain inventory and financial accuracy. These features improve operational efficiency and support informed business decisions.

Objectives

The main goals of implementing Salesforce CRM for HandsMen Threads are:

- Centralize and organize customer, order, and inventory data for accurate reporting.
- Automate business processes to reduce manual work and errors.
- Enhance customer satisfaction through timely communication and loyalty updates.
- Maintain data integrity and secure access to sensitive information.
- Enable scalable workflows for future business growth.

Phase 1: Requirement Analysis & Planning

❖ Understanding Business Requirements

- The business needs a unified system to manage customer information, orders, and inventory efficiently.
- Current manual workflows lead to inconsistent data and slower service responses.
- Automation is needed to enhance customer engagement and streamline loyalty tracking.
- Real-time monitoring of stock levels is required to prevent shortages and ensure timely restocking.

❖ Defining Project Scope and Objectives

- Build a customized Salesforce CRM suited for fashion retail operations.
- Integrate automation features for order notifications, loyalty updates, and stock alerts.
- Establish secure and accurate data management processes.
- Enable better decision-making through real-time reports and system dashboards.

❖ Design Data Model and Security Model

- Custom Objects: HandsMen_Customer__c, HandsMen_Order__c, HandsMen_Product__c, Inventory__c, Marketing_Campaign__c.

- Relationships: Orders linked to Customers and Products; Inventory tied to Orders and Warehouse.
- Automated data updates through Flows, Triggers, and Batch Jobs.
- Defined roles and profiles: Sales Manager, Inventory Manager, Marketing Team.
- Role-based access for object visibility and data editing.
- Validation rules and sharing settings for data accuracy and confidentiality.

❖ Stakeholders Mapping

Stakeholder	Role	Responsibility
Project Developer	Salesforce Admin/Developer	Handles system configuration, process automation, and customizations
Business Owner	Client/User	Shares business needs and confirms that the system meets expectations
Project Advisor	Faculty/Reviewer	Evaluates progress and provides guidance on implementation quality

❖ Execution Roadmap

- Requirement Analysis and Project Planning
- Salesforce Environment Setup and Configuration
- Interface Customization and Functional Testing
- Data Migration and Security Implementation
- System Deployment and Post-Launch Documentation

Phase 2: Salesforce Development – Backend & Configurations

❖ Setup Environment & DevOps Workflow

- Salesforce Developer Edition was configured with separate **sandbox environments** for testing and deployment.
- Version control and change tracking managed using Salesforce Change Sets.

❖ Customization of Objects, Fields, Validation Rules & Automation

- **Objects Created:** Customers, Orders, Products, Inventory, Marketing Campaigns.

- **Flows:**

- *Order Confirmation Flow* – triggers on order confirmation.
- *Stock Alert Flow* – triggers when stock < 5.
- *Loyalty Status Flow* – runs daily to update customer loyalty status.
- **Approval Process:** Configured for high-value order validation.
- **Process Builder:** Linked with record updates for automation continuity.

❖ Apex Classes, Triggers & Asynchronous Apex

- **Apex Triggers:**
 - *Update Order Total* – auto-calculates totals upon order save.
 - *Stock Deduction* – reduces stock after each confirmed order.
 - *Loyalty Status Update* – adjusts loyalty points based on purchase history.

HandsMen Customers

Recently Viewed ▾

4 items • Updated a few seconds ago

	HandsMen Customer Name	
1	lol	
2	iza	
3	lala	
4	Ian	

SETUP > OBJECT MANAGER
HandsMen Customer

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Lheriza Miranda, 11/9/2025, 6:43 AM

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Inventory	Inventory_c	Custom Object		11/9/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Marketing Campaign	Marketing_Campaign_c	Custom Object		11/9/2025	✓

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
HandsMen Customer	HandsMen_Customer_c	Custom Object		11/9/2025	✓
HandsMen Order	HandsMen_Order_c	Custom Object		11/9/2025	✓
HandsMen Product	HandsMen_Product_c	Custom Object		11/9/2025	✓

Setup Home Object Manager

Q: tabs

User Interface

Rename Tabs and Labels

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Help for this Page

Custom Object Tabs

Action	Label	Tab Style	Description
Edit	HandsMen Customers	People	
Edit	HandsMen Orders	Shopping Cart	
Edit	HandsMen Products	Box	
Edit	Inventories	Building	
Edit	Marketing Campaigns	Mail	

Web Tabs

No Web Tab have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

Action	Label	Tab Style	Description
Edit	Get Started with Appliance	Heart	
Edit	Get Started with Data Cloud	Map	
Edit	Get Started with MuleSoft	Heart	
Edit	Get Started with Salesforce DX	Building Block	
Edit	Welcome	Gears	

<https://test.salesforce.com/setup/objects/tabs>

Setup Home Object Manager

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		
HandsMen Order Name	Name	Auto Number		
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

Setup Home Object Manager

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		
Last Modified By	LastModifiedBy	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		
Owner	OwnerId	Lookup(User/Group)		
Start Date	Start_Date__c	Date		

Setup > OBJECT MANAGER
HandsMen Product

Fields & Relationships				
7 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price_c	Currency(18, 0)		
SKU	SKU_c	Text(60)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

Setup > OBJECT MANAGER
Inventory

Fields & Relationships				
7 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product_c	Master-Detail(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse_c	Text(60)		

Setup > OBJECT MANAGER
HandsMen Order

Validation Rules				
1 Items, Sorted by Rule Name				
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Lheriza Miranda, 11/9/2025, 6:40 AM

Setup > OBJECT MANAGER

Inventory

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Stock_Quantity	Top of Page	the inventory count is never less than zero.	✓	Lheriza Miranda, 11/9/2025, 6:41 AM

SETUP > OBJECT MANAGER

HandsMen Customer

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created by	CreatedById	Lookup(User)		✓
Email	Email__c	Email		✓
FirstName	FirstName__c	Text(60)		✓
FullName	FullName__c	Formula (Text)		✓
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
LastName	LastName__c	Text(60)		✓
Loyalty Status	Loyalty_Status__c	Picklist		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		✓
Total Purchases	Total_Purchases__c	Number(18, 0)		✓

SETUP

Apex Classes

Percent of Apex Used: 0.09%

You are currently using 5,547 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage [\[i\]](#)

Compile all classes [\[i\]](#)

View: All [\[▼\]](#) Create New View

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Security	DeveloperEditionUtils	devedapp	64.0	Active	164	OrgFarm EPIC	11/4/2025, 12:56 AM
Edit	DeveloperEditionUtilsTest	devedapp	64.0	Active	261	OrgFarm EPIC	11/4/2025, 12:56 AM
Edit Del Security	InventoryBatchJob		65.0	Active	975	Lheriza Miranda	11/9/2025, 8:49 AM
Edit Security	PostInstallScript	devedapp	64.0	Active	2,175	OrgFarm EPIC	11/4/2025, 12:56 AM
Edit	PostInstallScriptTest	devedapp	64.0	Active	781	OrgFarm EPIC	11/4/2025, 12:56 AM

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View:	All [▼]	Create New View		
Class Name	Namespace Prefix	Api Version	Created By	Last Modified By

The screenshot shows the 'Apex Triggers' page in the Salesforce Setup. At the top, there's a progress bar indicating 'Percent of Apex Used: 0.09%' and a note about character limits. Below it, a table lists four triggers:

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del	OrderTotalTrigger		HandsMen_Order	65.0	Active	848	Lheriza Miranda	<input type="checkbox"/>
Edit Del	OrderTrigger		HandsMen_Order	65.0	Active	62	Lheriza Miranda	<input type="checkbox"/>
Edit Del	PurchaseAdder		HandsMen_Order	65.0	Active	2,468	Lheriza Miranda	<input type="checkbox"/>
Edit Del	StockDeductionTrigger		HandsMen_Order	65.0	Active	1,194	Lheriza Miranda	<input type="checkbox"/>

Phase 3: UI/UX Development & Customization

- Setting up the Lightning App using App Manager for Customers, Orders, Products, Inventory, and Campaigns.
- Designing page layouts and interactive forms that change depending on user roles with Dynamic Forms.
- Configuring user management for admins, sales, inventory, and marketing staff with roles, profiles, and permission sets.
- Creating reports and dashboards to show sales performance, top-selling products, inventory status, and customer loyalty.
- Optionally building Lightning Web Components (LWC) to enhance interface functionality and display dynamic information.
- Setting up Lightning Pages for easier navigation and a clean, organized interface.

- Including screenshots of every interface element, page layout, report, dashboard, and component no exceptions.

The screenshot shows the 'Users' page in the Salesforce Setup. The left sidebar shows various settings like User Management Settings, Feature Settings, Data.com, Service, Embedded Service, and User Interface. The main area displays a table of users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Feed	Chatter	chatty@000000000evorusad.d1subc0ib@chatter.salesforce.com	Marketing	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC_OrFarm	QEPIG	sec_1ab78254115@orgfarm.salesforce.com	Inventory	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson_Daniel	dmitka	mihelica2456@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Kel	krnika	mihelica2456@gmail.com		<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Niklaus	nnika	mihelica123@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Miranda_Lheriza	mh	mihelica123@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Interpolation	intero	interpolation@000000000evorusad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	User_Search	asc	inso@itsecsearch@2000@00000evorusad.com		<input type="checkbox"/>	

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfdcadmin	11/4/2025
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfdcadmin	11/4/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime	sfdcadmin	11/4/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfdcadmin	11/4/2025
Edit Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	sfdcadmin	11/4/2025
Edit Del	Commerce Reorder Portal Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autouser	11/4/2025
Edit Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrolment of an attendee to a Group service appointment.	sfdcadmin	11/4/2025
Edit Del	Low Stock Alert	Text	✓		mjh	11/9/2025
Edit Del	Loyalty Program Email	HTML	✓		mjh	11/10/2025
Edit Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	OEPIC	11/4/2025
Edit Del	Order Confirmation Email	HTML	✓		mjh	11/9/2025
Edit Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm rescheduling of a service appointment.	sfdcadmin	11/4/2025
Edit Del	Sales New Customer Email	Text	✓	Email to new customers	OEPIC	11/4/2025
Edit Del	Scheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a service appointment.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Payment Reminder for Service Appointment Email	Custom	✓	Email Template to remind customers to pay for their service appointment.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Service Appointment Cancellation Email	Custom	✓	Email Template to confirm the cancellation of a paid service appointment.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Service Appointment Confirmation Email	Custom	□	Email Template to confirm scheduling of a paid service appointment.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Service Appointment Confirmation Email for Guest Users	Custom	□	Email Template to confirm scheduling of a paid service appointment for guest users.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Service Appointment Rescheduled Email - Authenticated Users	Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for authenticated users.	sfdcadmin	11/4/2025
Edit Del	Scheduler Payments Service Appointment Rescheduled Email - Guest Users	Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for guest users.	sfdcadmin	11/4/2025

Phase 4: Data Migration, Testing & Security

- Loading data into Salesforce using **Data Import Wizard** and **Data Loader** for customers, products, orders, and inventory.
- Enabling **Field History Tracking** to monitor critical changes like Order Total, Stock Quantity, and Loyalty Points.
- Configuring **Duplicate Rules** and **Matching Rules** to prevent repeated or conflicting records.
- Setting up **Profiles, Roles, Role Hierarchy, Permission Sets, and Sharing Rules** to control access securely.
- Creating **Test Classes** in Apex to validate triggers, batch jobs, and automation logic.
- Performing tests for all Salesforce features including bookings, approval processes, task automation, flows, and triggers.
- Capturing **input and output screenshots** for every test case — demonstrating the system works as intended.

SETUP

Classic Letterheads

All

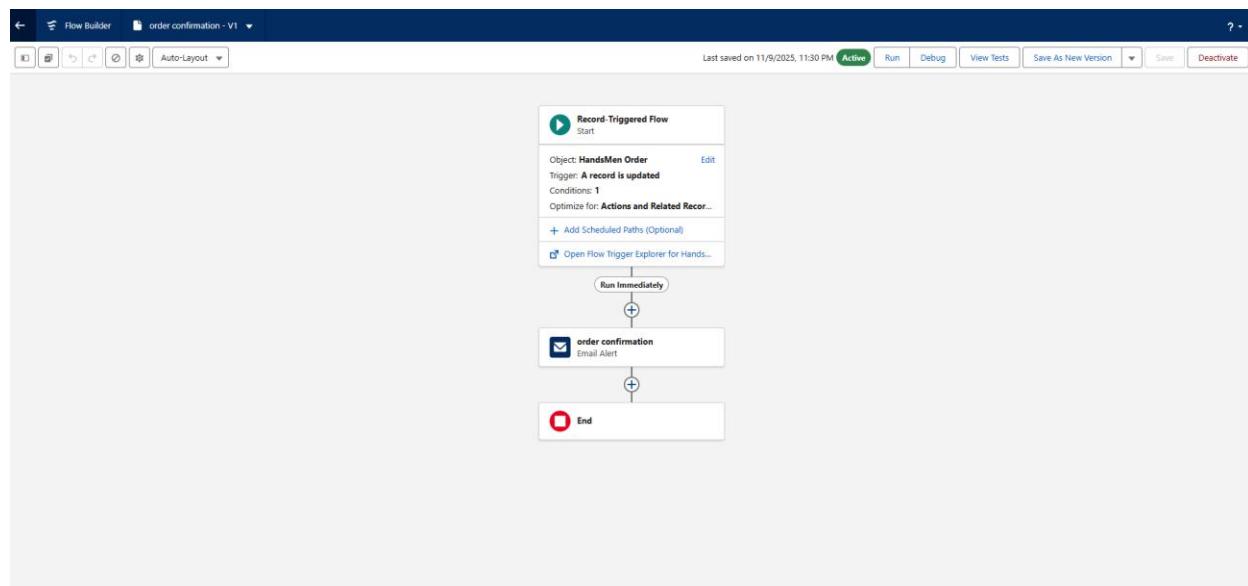
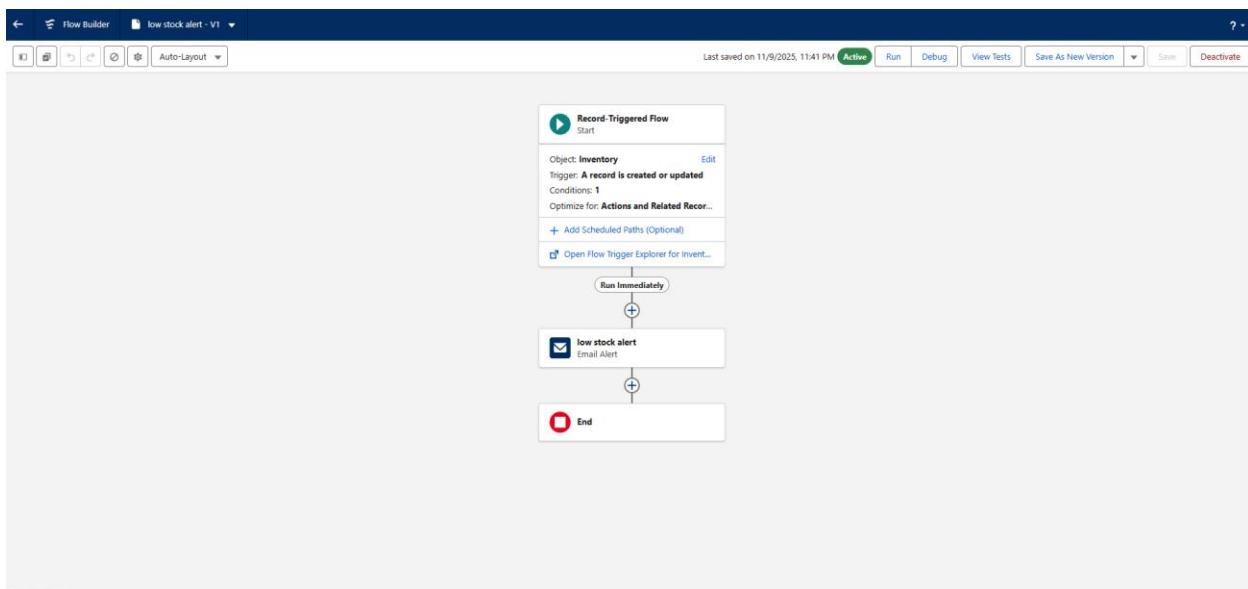
Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Below is a list of your organization's Letterheads.

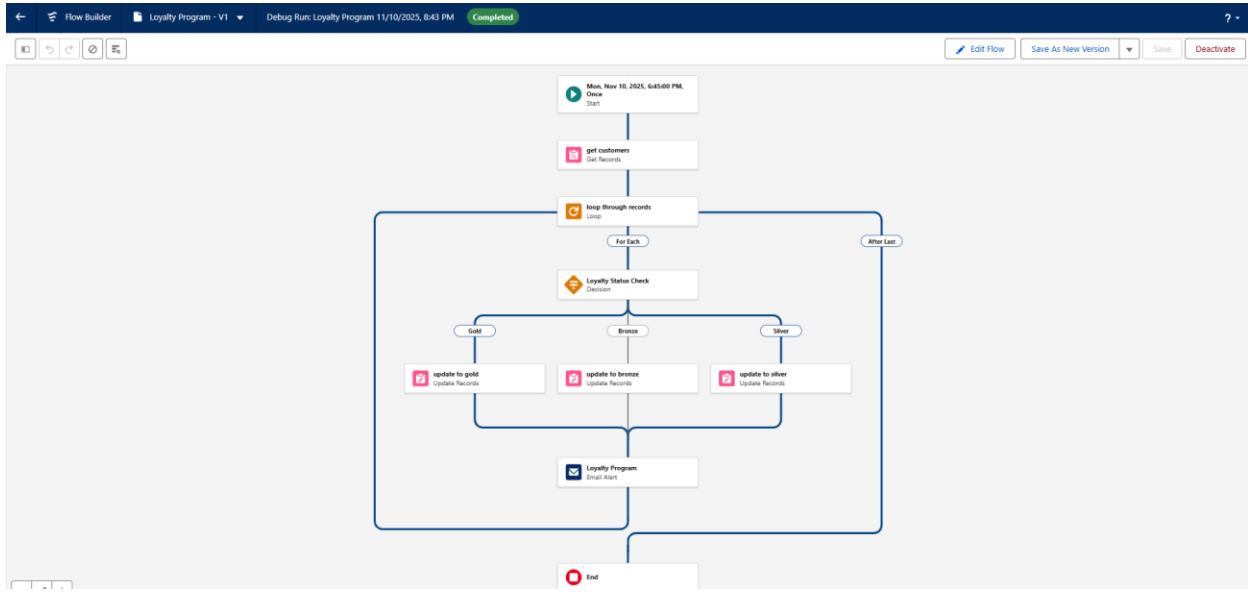
Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.

View: All | Create New View

Action	Letterhead Label	Available For Use	Description
Edit Del	Handsmen Threads	✓	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All





Phase 5: Deployment, Documentation & Maintenance

❖ Deployment Strategy

- Used **Salesforce Change Sets** for moving custom objects, Flows, and triggers from sandbox to production.
- Conducted final testing post-deployment to verify configuration consistency.

❖ System Maintenance & Monitoring

- Regular data audits and validation checks scheduled.
- Weekly monitoring of batch jobs and system logs for performance tracking.
- Backup and recovery plans in place for data security.

❖ Troubleshooting Approach

- Defined escalation path for issue resolution (Admin → Developer → Project Lead).
- Logged and tracked issues in Salesforce for traceability.

Conclusion

The HandsMen Threads Salesforce CRM project successfully transformed the company's data management and customer engagement processes. Through automation, robust data modeling, and secure workflows, the system improved operational efficiency, reduced manual errors, and enhanced customer satisfaction. The project demonstrated Salesforce's ability to integrate business operations seamlessly empowering HandsMen Threads to scale efficiently, make informed decisions, and strengthen its position in the fashion industry.