PROJECT OVERVIEW

This capstone project introduces a tailored Salesforce CRM solution developed for HandsMen Threads to enhance the management of customer, product, and order information across the company. The system establishes a centralized and organized data framework that keeps vital business records—such as customer profiles, product catalogs, inventory tracking, and order histories—accurate, easily accessible, and consistently updated. To meet the organization's core operational needs, the CRM incorporates automated workflows including order confirmation emails, loyalty program notifications, low-stock alerts, and scheduled synchronization for bulk orders. These automations streamline business processes, reduce manual errors, sustain optimal inventory levels, and foster stronger customer relationships. By leveraging Salesforce components such as Lightning App Builder, Flow, Apex, and data validation rules, this project delivers a scalable, efficient, and user-friendly CRM platform that supports both everyday operations and long-term business expansion.

OBJECTIVES

The main objective of this CRM project is to develop a well-structured, automated, and dependable system that strengthens both customer management and internal operations for HandsMen Threads. By emphasizing accurate data entry, smooth process automation, and role-based user access, the system aims to enhance customer interactions, simplify order processing, and improve inventory monitoring. These goals contribute to greater business efficiency by enabling faster service, more personalized customer experiences, reduced manual workload, and better coordination between departments. In addition, the CRM provides a strong foundation for scalability, consistent operations, and continuous process improvement over time.

SPECIFIC OBJECTIVES

- Develop a centralized Salesforce data model to efficiently organize and store essential business information.
- Ensure data accuracy and consistency by implementing validation rules and data quality controls within the interface.
- Automate customer communications, such as sending order confirmation emails and loyalty program notifications.
- Set up internal workflow automations, including inventory stock alerts and scheduled bulk order processing.
- Enhance technical skills in Salesforce development tools like Apex, Flows, and Lightning App Builder.
- Develop a scalable and flexible system that can adapt to future business needs and system upgrades.

TECHNOLOGY DESCRIPTION

This project uses several Salesforce platform features to build a customized and efficient system for managing business processes at HandsMen Threads. Each component plays a specific role in ensuring data accuracy, secure access, and workflow automation.

Salesforce Platform

Serves as the core environment for developing custom applications, managing business data, and automating workflows.

Custom Objects

Custom objects are designed to store company-specific records such as customer profiles, products, orders, and loyalty program details.

Tabs

Tabs provide users with easy access to custom objects, allowing them to view, add, and manage records conveniently.

Custom App

A dedicated Salesforce app is created to organize essential tabs, dashboards, and tools in one workspace, ensuring a user-friendly interface aligned with business needs.

Profiles

Profiles define user permissions, determining which data and functionalities each user can access within the system.

Roles

Roles establish a user hierarchy that manages data visibility and reporting according to each employee's position in the organization.

Permission Sets

Permission sets offer additional access rights without modifying a user's main profile, providing flexibility in permission management.

Validation Rules

Validation rules maintain data integrity by ensuring that required information is correct and complete before saving a record.

Email Templates

Standardized email templates are created for consistent communication, including order confirmations, loyalty updates, and stock notifications.

Email Alerts

Email alerts automatically send predefined emails when specific triggers or conditions are met within the system.

Flows

Flows automate routine tasks such as loyalty status updates, notifications, and record modifications—reducing the need for manual input.

Apex

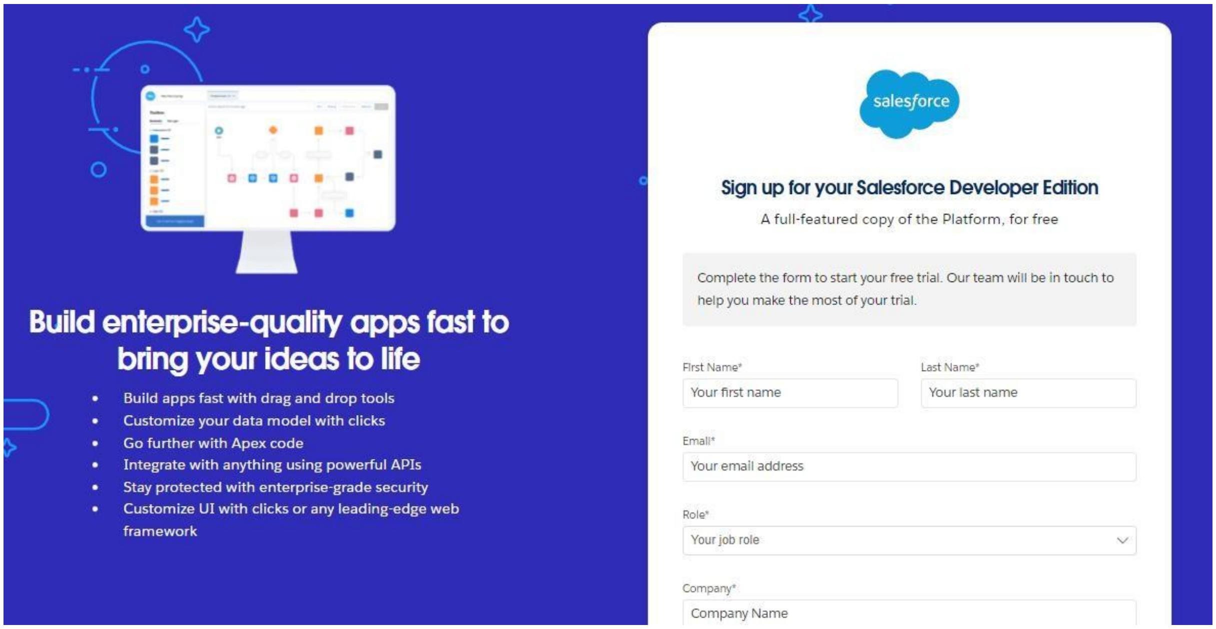
Apex handles complex business logic and advanced automations that go beyond standard Salesforce configurations, including scheduled bulk order processing.

DETAILED EXECUTION OF PROJECT PHASES

This section describes the step-by-step process followed in developing the Salesforce CRM solution for HandsMen Threads, ensuring an organized and efficient implementation.

1. Developer Org Setup

- Created a Salesforce Developer Org to serve as the project environment.
- Configured company information, default settings, and security configurations.
- Installed necessary packages and enabled required features such as Dev Hub, Flows, and Email Deliverability.



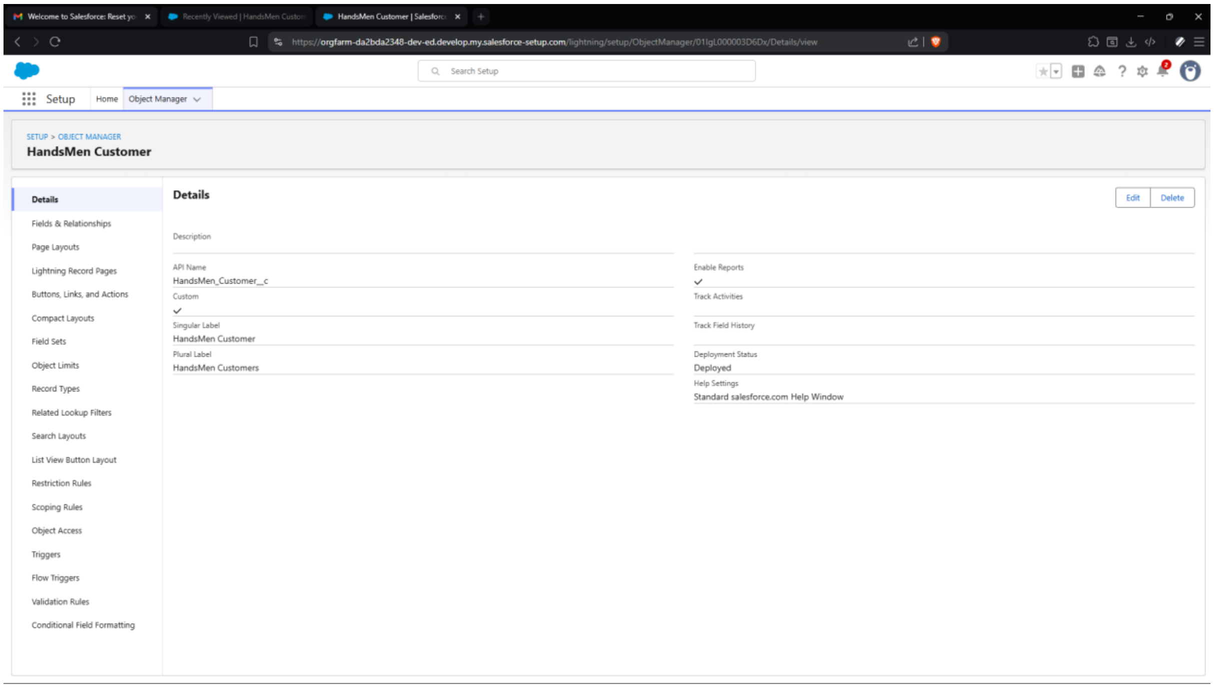
2. Custom Object Creation

- Designed data models based on the business workflow.
- Created custom objects such as HandsMen Customer,Handsmen Orders, Handsmen Order, Inventory, and Marketing Campaigns.

Step Followed:

- Navigate to Setup - Object Manager - Create - Custom Object
- Provided Label, Name, and Enable reports/ search

- Saved and Created Tabs for Each object

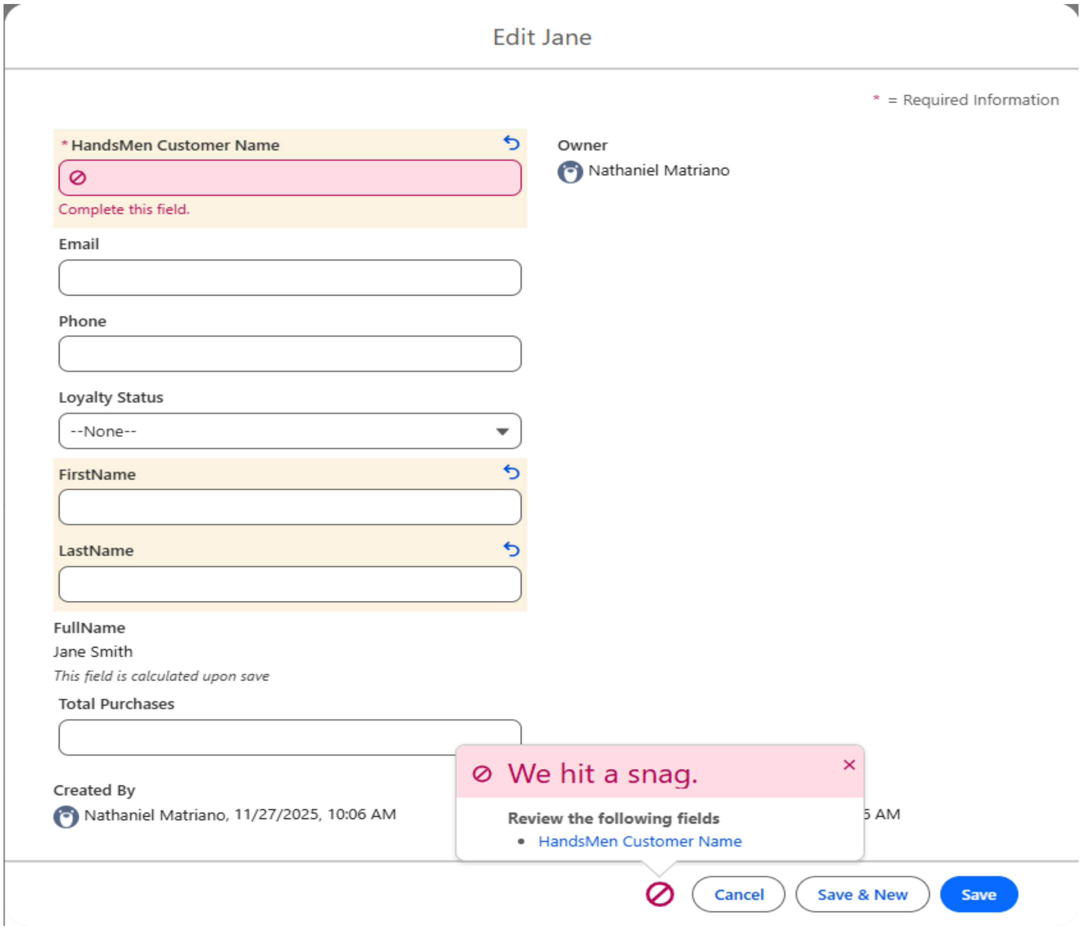


3. Lightning App Setup

- Developed a custom Lightning App named HandsMen Operations App.
- Added custom objects, reports, dashboards, and utilities to the navigation bar.
- Customized record pages with Lightning App Builder for better user experience.

4. Validation Rules Implementation

- Set up validation rules to prevent incorrect or missing data (e.g., no negative quantities or empty product fields).
- Added clear error messages to guide users.
- Tested rules to ensure they accurately enforce data quality.

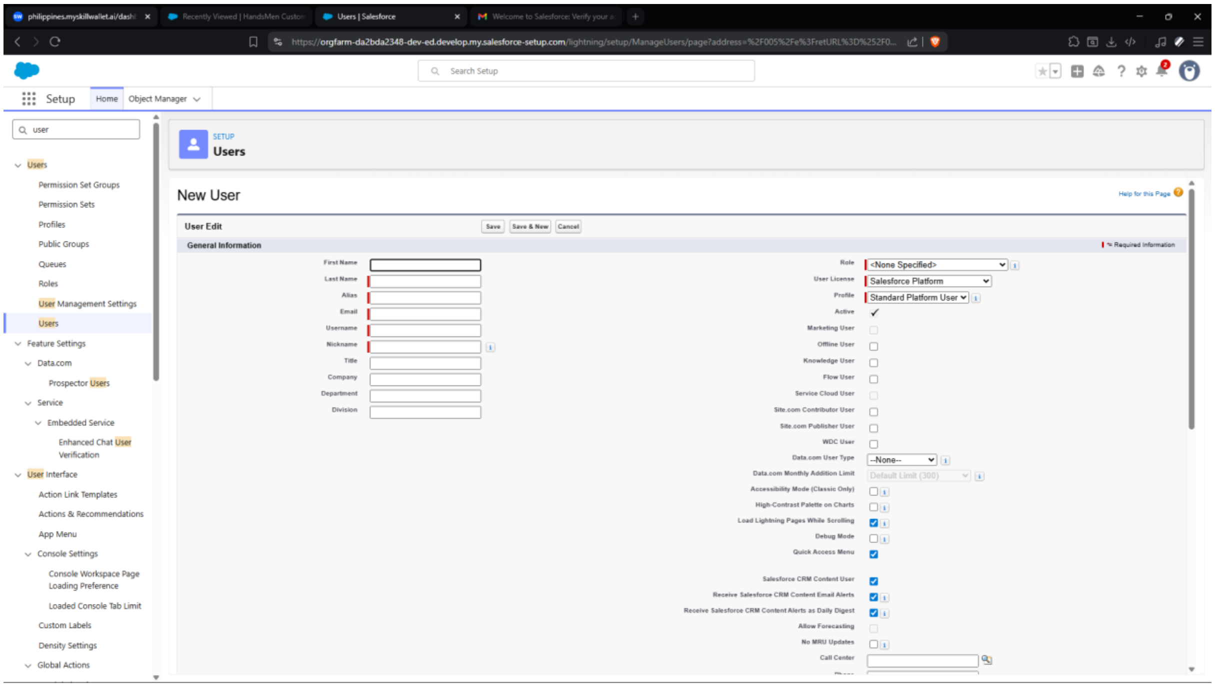


5. User Roles & Profiles Setup

- Created a role hierarchy reflecting the company structure (Admin → Manager → Staff).
- Set up profiles like System Administrator, Operations User, and Sales User.
- Defined field-level security, object permissions, and tab visibility for each profile.

6. User Creation

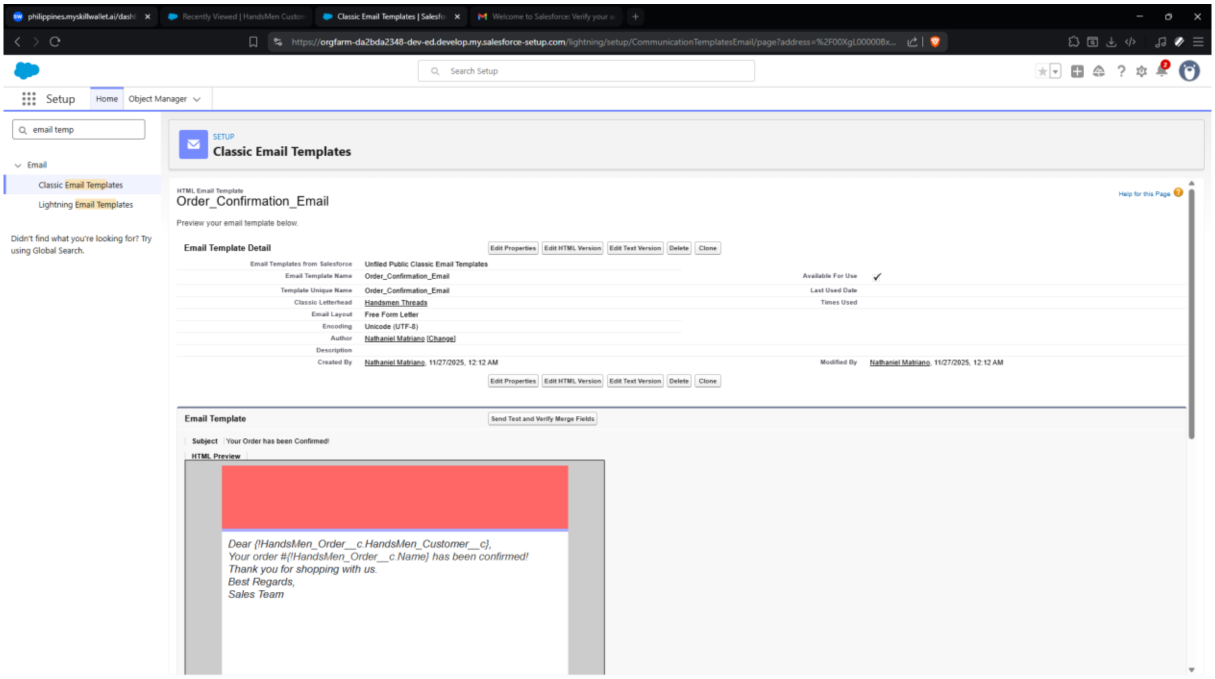
- Created test users to simulate business roles.
- Assigned appropriate profiles, roles, and permission sets.
- Tested login access and visibility controls to confirm correct configuration.



7. Email Templates & Email Alerts

Designed email templates for:

- Order Confirmation
- Loyalty Status Update
- Low Stock Notification
- Created email alerts that work with flows or triggers to send automatic notifications.
- Verified deliverability through test records.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Help for this Page
Preview your email template below.
Email Template Detail
Edit Properties
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Modified By
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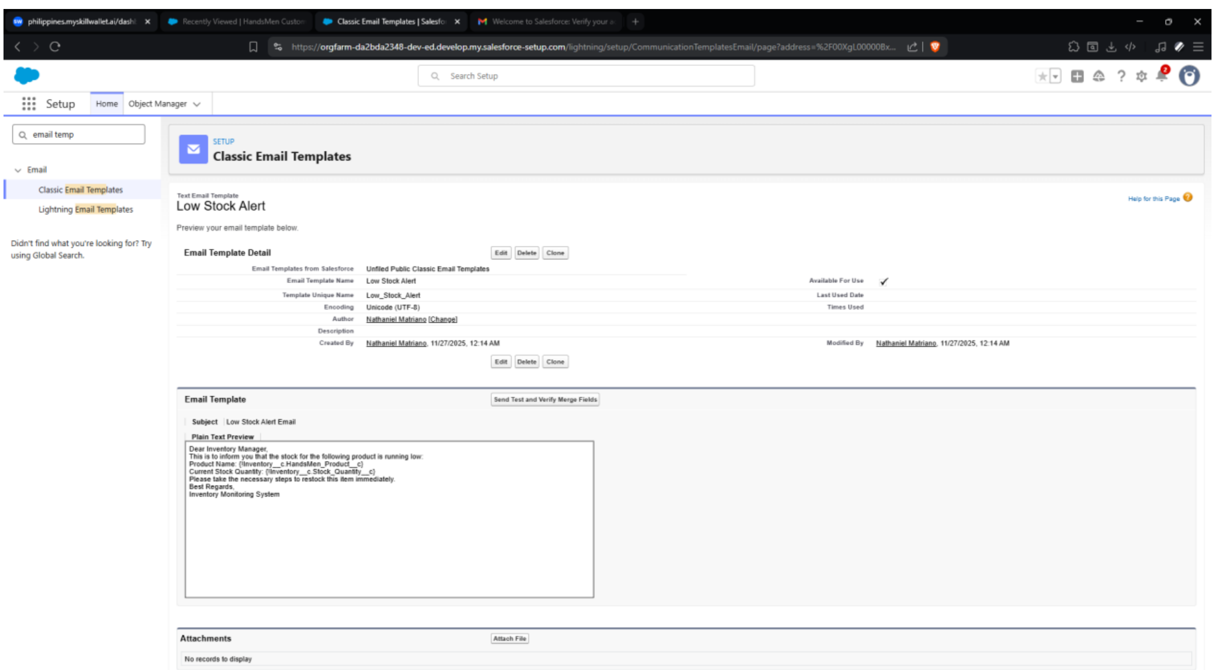
Email Template
Send Test and Verify Merge Fields
Subject
Your Order has been Confirmed!
HTML Preview
Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order #{!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team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Preview your email template below.
Email Template Detail
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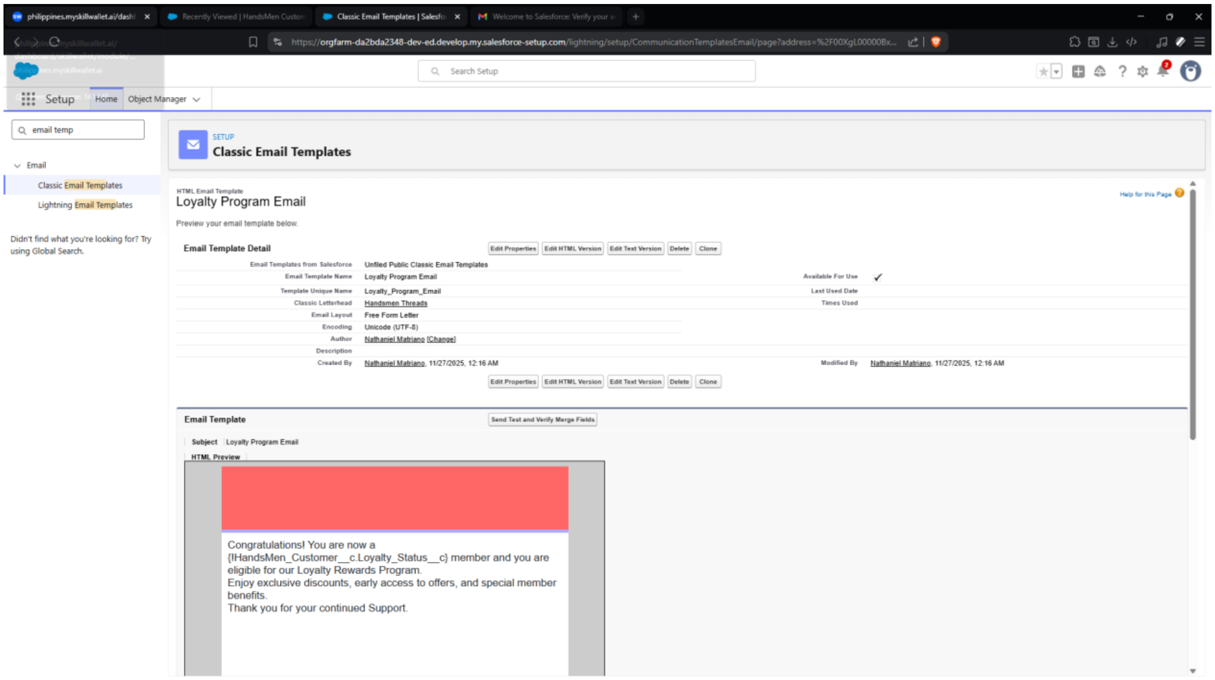
Author
Nathaniel Matriano [Change]
Description
Created By
Nathaniel Matriano, 11/27/2025, 12:14 AM
Modified By
Nathaniel Matriano, 11/27/2025, 12:14 AM
Email Template
Send Test and Verify Merge Fields
Subject
Low Stock Alert Email
Plain Text Preview
Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: {!Inventory__c.HandsMen_Product__c}
Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System
Attachments
Attach File
No records to display

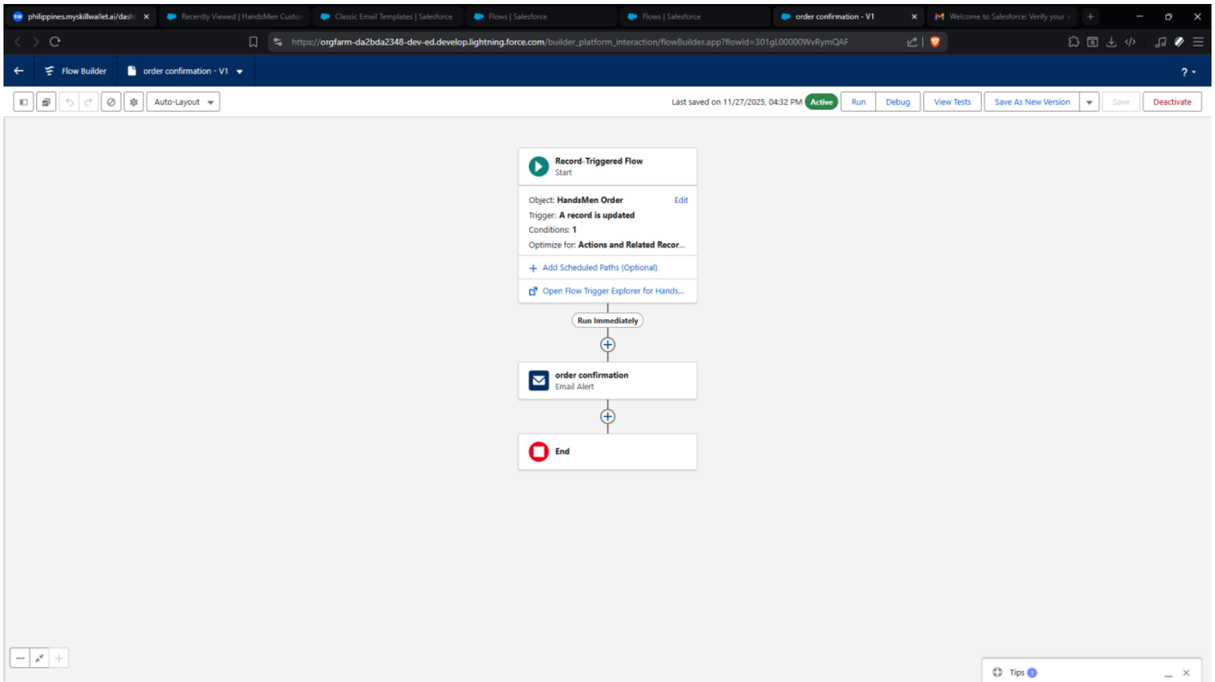


8. Flow Implementation

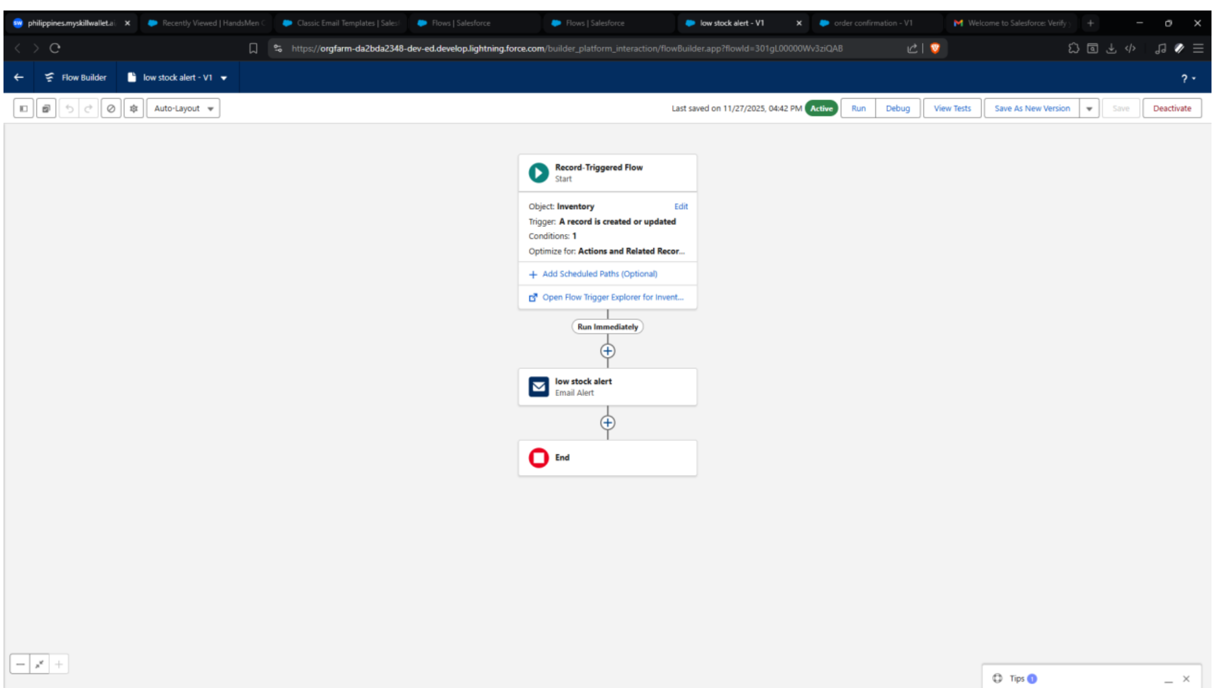
Built Record-Triggered Flows for:

- Updating loyalty levels based on order history
- Sending stock alerts when inventory drops below threshold
- Automating field updates during order confirmation
- Designed Scheduled Flows for daily processing of bulk orders.
- Ensured error handling with fault paths and debug logs.

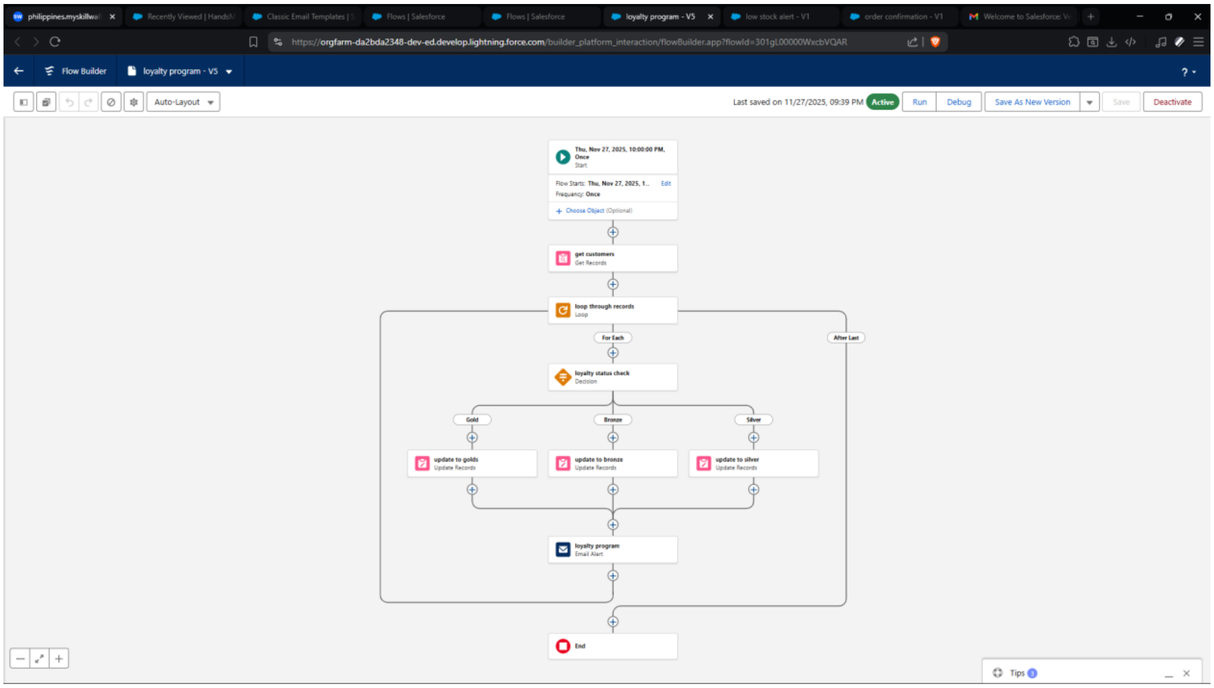
A. Order Confirmation Flow



B. Stock Alert Flow



C. Scheduled Flow: Loyalty Update



9. Apex Development

- Built Apex triggers for advanced tasks like complex inventory updates.
- Created asynchronous Apex classes for daily financial and inventory processing.
- Developed test classes to comply with Salesforce deployment requirements.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

A realistic walkthrough of customer interactions and system operations.

To better understand how the solution works, imagine a real scenario in HandsMen Threads' daily operations.

1. Customer Registration

- A new customer, Mark Reyes, visits to purchase clothing online.
- Sales representative registers him:
- Name: Mark Reyes
- Email: mark.reyes@example.com
- Loyalty Status: New Customer

Validation rules ensure all required information is correctly entered.

2. Product Setup

- Warehouse staff enters new products:
- Product Name: Denim Jacket
- Stock: 12
- Price: 1,500 PHP
- Category: Outerwear
- Product fields support reporting, automation, and inventory tracking.

3. Order Placement

- Mark purchases 1 Denim Jacket.
- The Sales Representative creates an order:
- Customer: Mark Reyes

- Product: Denim Jacket
- Quantity: 1
- Status: Pending → Updated to Confirmed
- When the order is confirmed:
- Stock automatically decreases from 12 → 11
- An email confirmation is sent to Mark
- The system logs the transaction in the Inventory Log

4. Inventory Update

After deducting the stock:

Inventory Log captures:

- Product: Denim Jacket
- Change: -1
- Date: Today
- Performed by: Sales Representative

If the stock falls below 5 units:

The Low Stock Flow triggers

Warehouse receives an email alert:

"Denim Jacket stock is now low (4 units remaining). Please restock soon."

5. Loyalty Program Update

Each confirmed order adds loyalty points to Ava's record.

Example:

- Mark earns 10 points for this purchase.
- Once she reaches a threshold (e.g., 50 points), the system updates his status to:
- “Silver Member”

A personalized loyalty update email is automatically sent.

6. Email Notifications

The system sends:

- Order Confirmation – triggers instantly when order is confirmed
- Loyalty Update – if Mark reaches a new tier
- Low Stock Alert – sent to warehouse team
- Daily Bulk Summary – sent at midnight to Finance and Warehouse

These automated alerts ensure smooth communication.

7. User and Role Authorization

Each user sees only what they need:

- Sales Representative sees Customers and Orders
- Warehouse User sees Products and Inventory Logs
- Finance User sees daily summaries
- Admin sees and manages everything
- This ensures secure and efficient access.

SCREENSHOTS

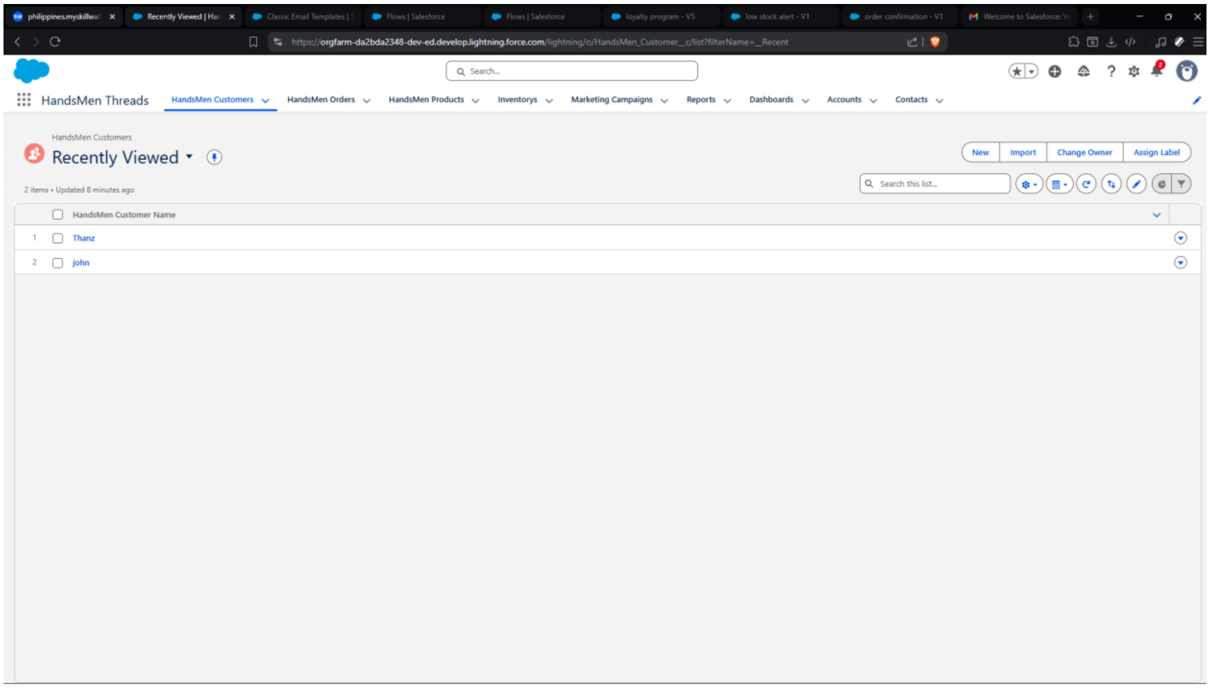


Fig: Custom App HandsMen Threads

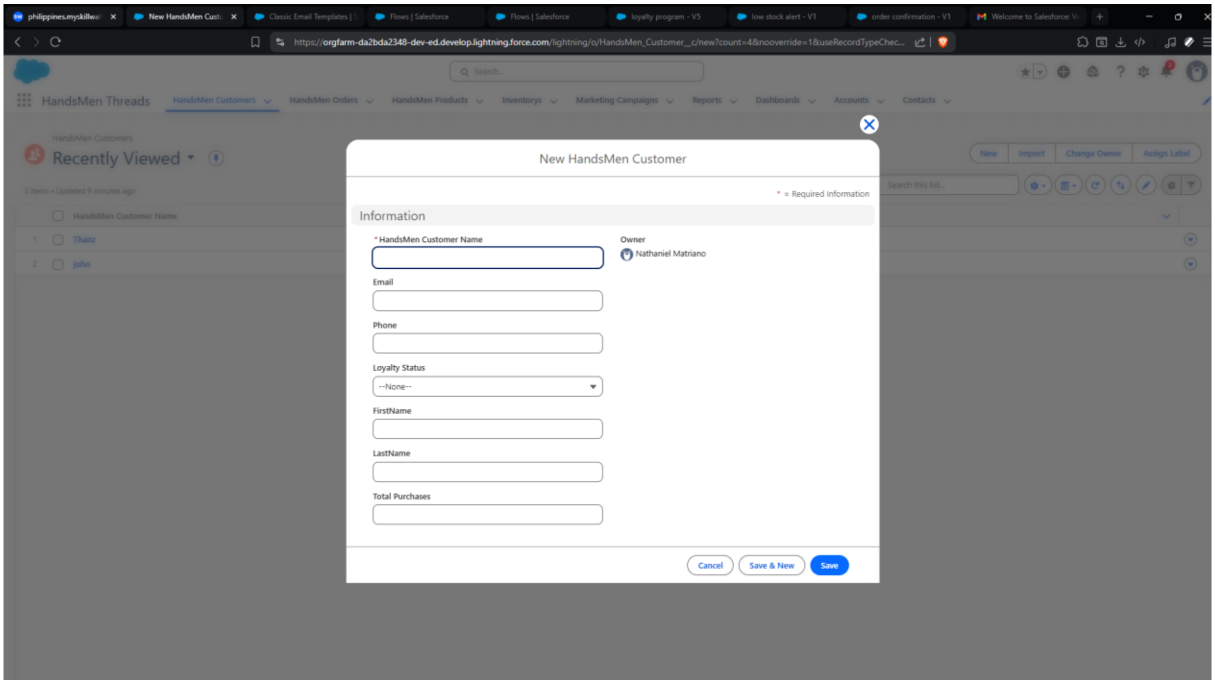


Fig: Customer Creation in HandsMen Threads

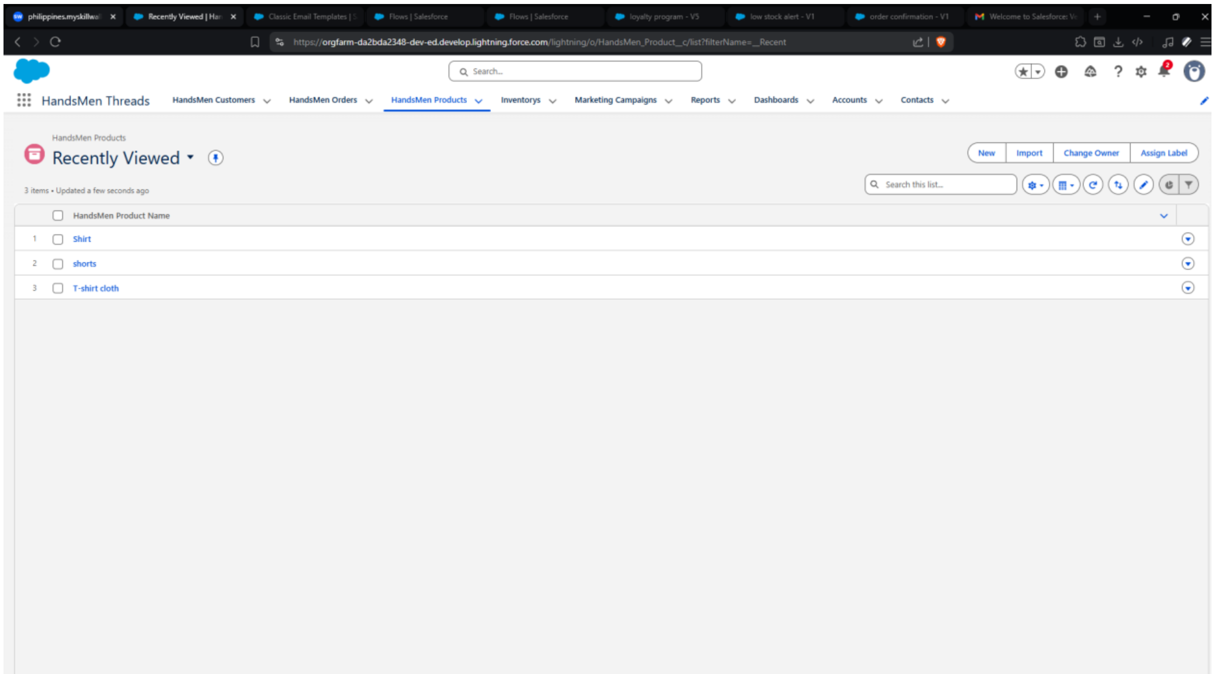


Fig: HandsMen Threads Products

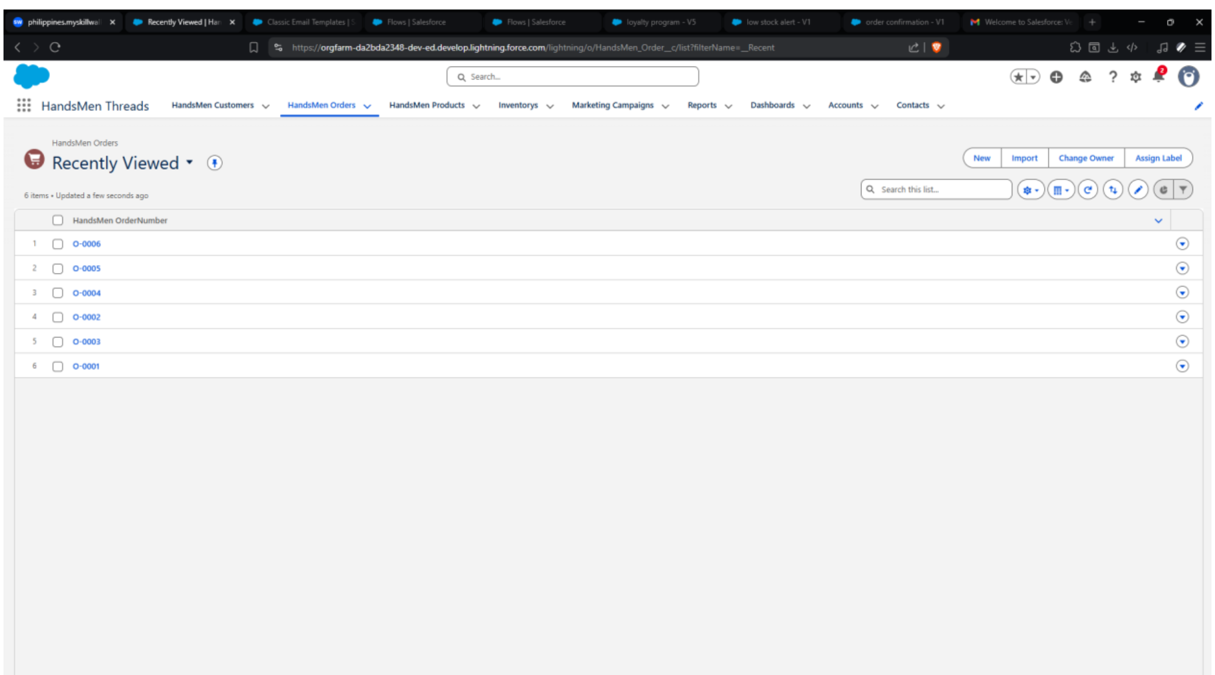


Fig: HandsMen Threads Orders

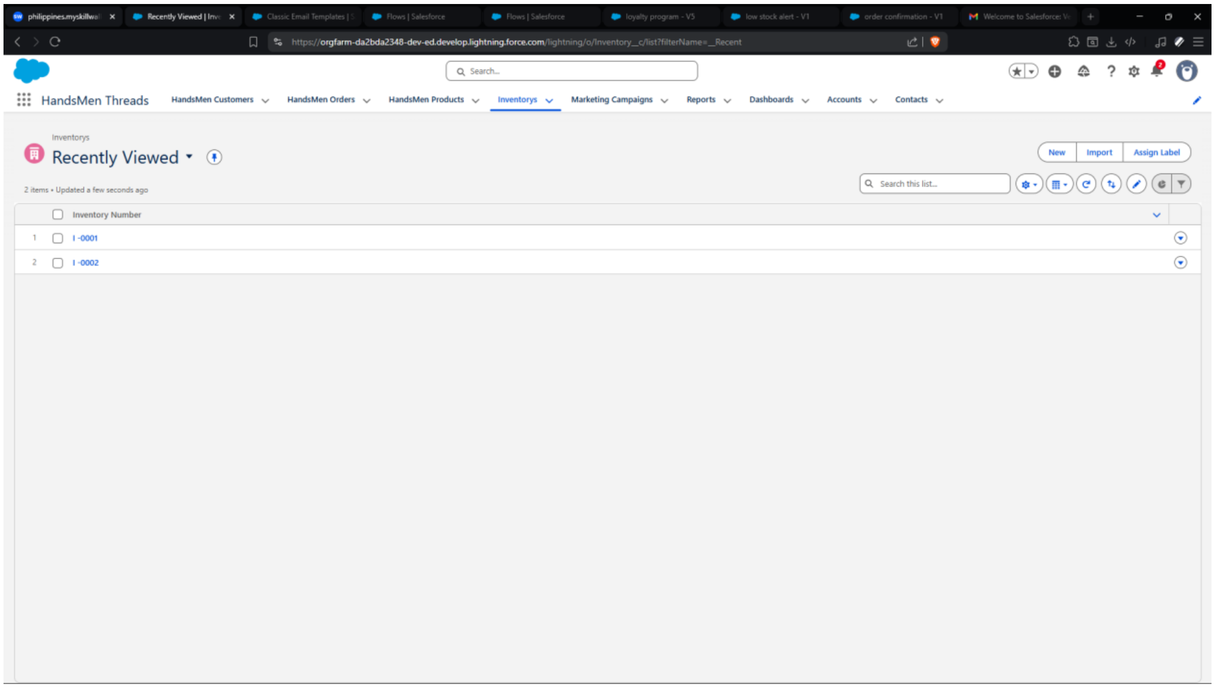


Fig: HandsMen Threads Inventories

<u>CONCLUSION</u>

This project successfully delivered a structured and automated Salesforce CRM tailored for HandsMen Threads. By leveraging custom objects, validation rules, automation tools, and Apex logic, the system enhances data accuracy, streamlines business operations, and improves customer engagement. It effectively supports current workflows while increasing operational reliability and overall efficiency. The implementation highlights the benefits of well-designed digital solutions in modern business environments.

Future Scope:

While the system meets the company's current needs, several enhancements can be considered for future growth:

- **Mobile App Integration**: Enable warehouse staff and sales agents to update records directly from mobile devices.

- **AI-Powered Recommendations**: Einstein AI to suggest products and forecast inventory needs.

- **Advanced Reporting Dashboard**: Provide visual insights into sales trends, customer retention, and inventory movement.

- **Customer Self-Service Portal**: Allow customers to track orders, update personal information, and view loyalty points online.

- **Payment Gateway Integration**: payment updates and streamline financial reconciliation.

- **Multi-Warehouse Management**: Expand support for operations across multiple storage locations.

These improvements can further boost efficiency, enhance customer satisfaction, and support long-term digital growth for the organization.