

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

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ABSTRACT:

This document outlines the successful implementation of a tailored Salesforce Customer Relationship Management (CRM) system for **HandsMen Threads**, a high-end men's fashion and tailoring company. The primary goal was to optimize business operations, improve customer interaction, and ensure consistent data quality across all departments.

The solution was built on a robust data foundation using five essential custom data structures: Customer, Order, Product, Inventory, and Marketing Campaign. Key business processes were automated using Salesforce's built-in tools (Record-Triggered Flows, Scheduled Flows, Email Alerts) and custom code (Apex). These automations handle critical tasks such as sending order confirmations, updating customer loyalty tiers, and issuing proactive low-stock notifications.

To guarantee data accuracy and security, the system includes data validation rules and a role-based security model tailored for the Sales, Inventory, and Marketing teams. Furthermore, a scheduled Apex job was implemented to regularly update low stock quantities. This comprehensive CRM deployment has resulted in a better customer experience through personalized communication, enhanced operational efficiency via automation, and established a scalable platform for the brand's future expansion.

OBJECTIVE

The core objective of this project was to design and deploy a custom Salesforce CRM solution for HandsMen Threads. This system is intended to streamline essential business functions, preserve data integrity, and ultimately boost customer satisfaction.

By creating a single, centralized platform to manage all data related to customers, orders, products, inventory, and marketing efforts, the project aimed to achieve the following specific goals:

- **Automate core processes**, including sending order confirmations, managing customer loyalty status changes, and generating stock alerts.
- **Ensure accurate and uniform data** input by enforcing strict validation rules.
- **Provide real-time visibility** into current inventory levels and all customer interactions.
- **Improve collaboration** among internal teams through a controlled, role-based access system.

TECHNOLOGY DESCRIPTION

Salesforce:

The project leverages the Salesforce platform, a cloud-based CRM system that enables businesses to manage customer data, automate workflows, and enhance service, marketing, and sales activities. Salesforce offers both configuration tools (point-and-click) and programming capabilities (Apex and Flows) for building custom business solutions.

Custom Objects:

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer__c – Stores customer info
- Product__c – Stores product details
- Order__c – Stores orders

Tabs:

Used to display object data within the Salesforce user interface.

Example: A tab for Product__c allows users to easily view and manage products.

Custom App:

A collection of tabs grouped together to support a specific business function.

Profiles:

Define a user's permissions, controlling what they can see, do, and edit within the system.

Roles:

Control data visibility based on the organizational hierarchy, used for sharing and reporting.

Permission Sets:

Grant additional permissions to users without modifying their base profile.

Validation Rules:

Ensure that data entered by users meets specific business criteria.

Example:

- Email must contain @gmail.com
- Stock cannot be negative

Email Templates:

Predefined formats for standardized emails sent to customers or internal users.

Example:

- “Order Confirmation” template

Email Alerts:

Automated actions within Flows or Workflow Rules that trigger the sending of an email using a template.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:

A tool for automating complex business logic without writing code, capable of creating, updating, or sending notifications.

Example:

- Flow triggers email alerts on new order

Apex:

Salesforce’s proprietary object-oriented programming language, used for writing custom, complex logic.

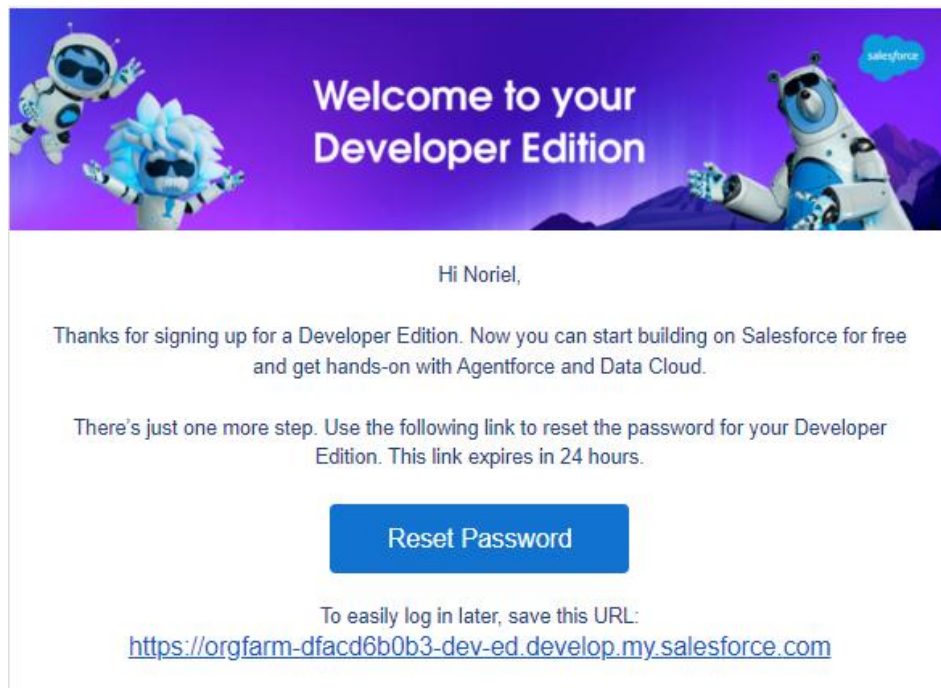
Example:

- Update Total_Amount__c in orders
- Reduce inventory stock

DETAILED EXECUTION OF PROJECT PHASES

1. Develop Org Setup

- A dedicated Salesforce Developer Organization (Org) was created and configured, providing the necessary environment for development and testing.



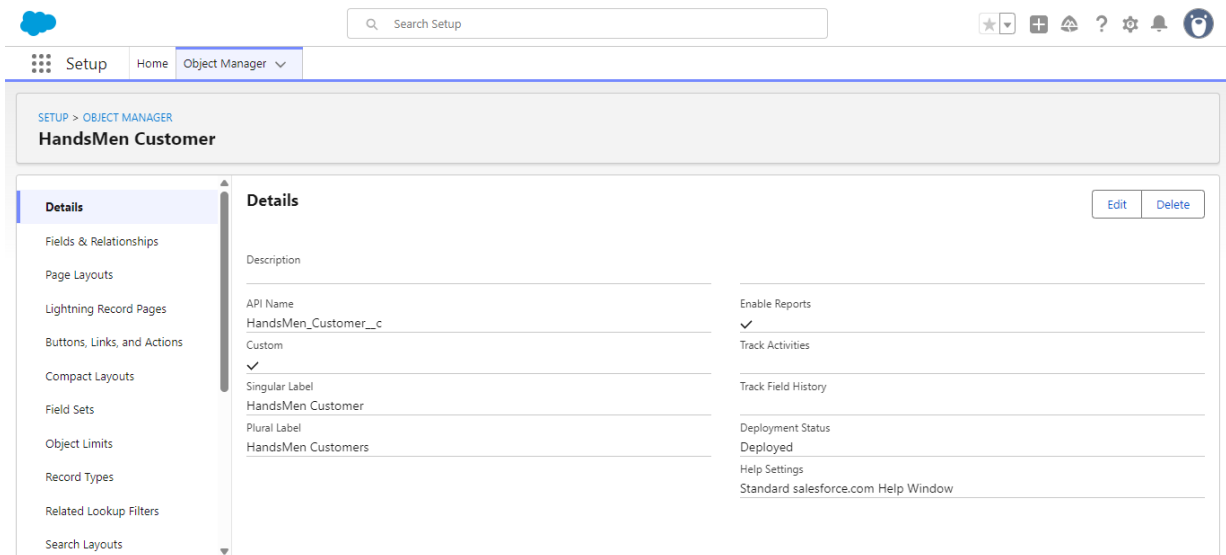
2. Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer** - Stores customer info like email, phone, loyalty status.
- **HandsMen Product** – Stores product catalog details like SKU, price, and stock.
- **HandsMen Order** – Stores orders placed by customers, including quantity and status.
- **Inventory** – Tracks stock quantity and warehouse location.
- **Marketing Campaign** – Stores promotional campaigns and scheduling.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



3. Create the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator Profile.

4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object:** Prevents saving if Total_Amount__c <= 0.
Error: “Please Enter Correct Amount”
- **Customer Object:** Validates email contains @gmail.com.
Error: “Please fill Correct Gmail”

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Owner

Noriel Aricayos

Complete this field.

Email

Phone

Loyalty Status

--None--

FirstName

Cancel Save & New Save

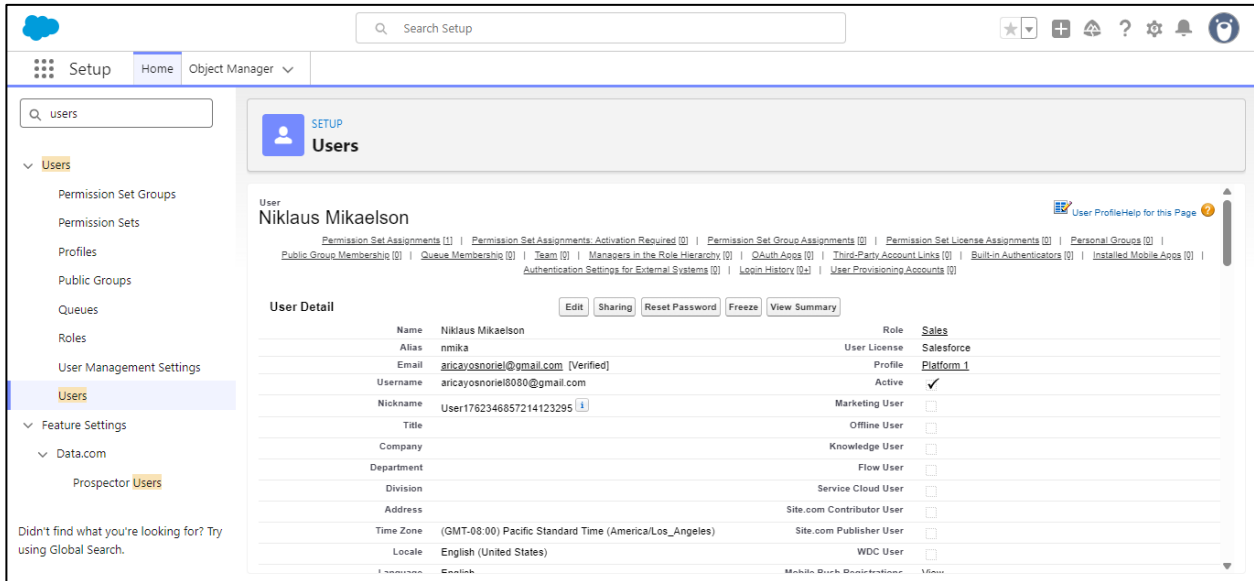
5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 and added access to necessary custom objects.
- Created roles for different departments:
 - Sales Manager, Inventory Manager, Marketing Team

6. User Creation

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson – Assigned the Sales role
- Kol Mikaelson – Assigned the Inventory role
- These role-based assignments help enforce proper data access and process control within the system.

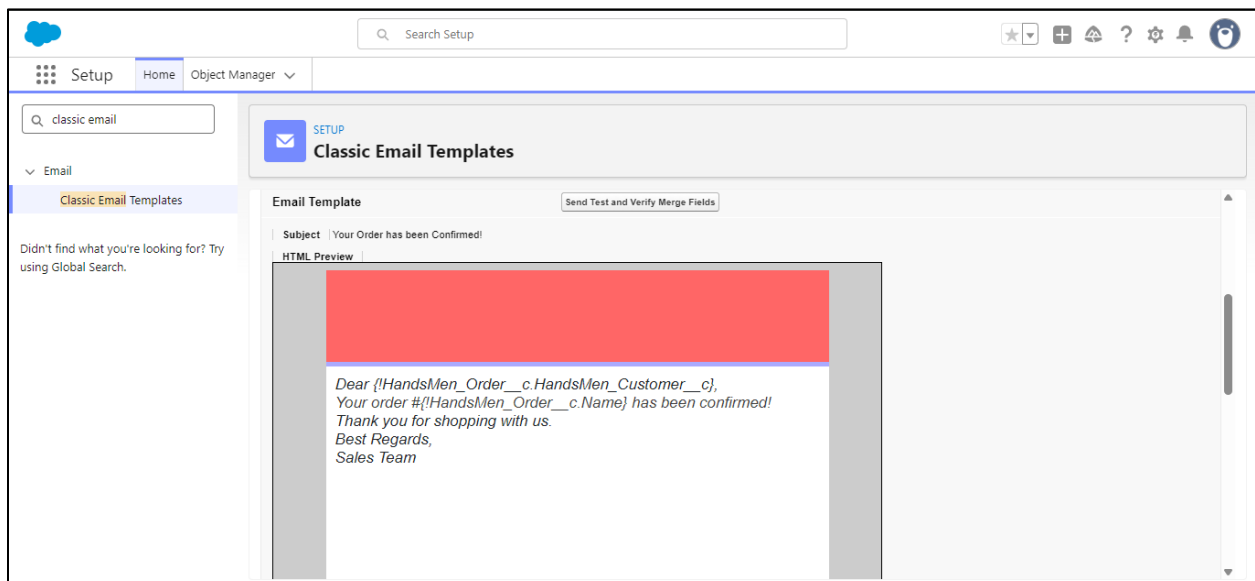


7. Email Template & Alerts

Created three email templates:

- Order Confirmation – Sent on order status = Confirmed
- Low Stock Alert – Sent when Inventory < 5 units
- Loyalty Program Email – Sent when loyalty status changes

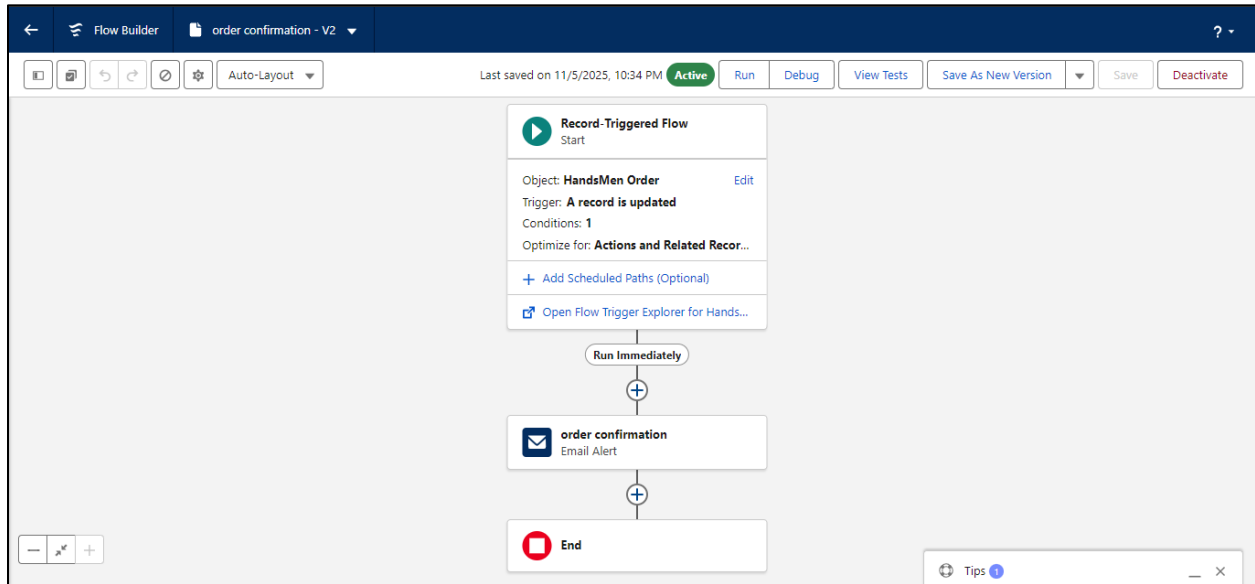
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

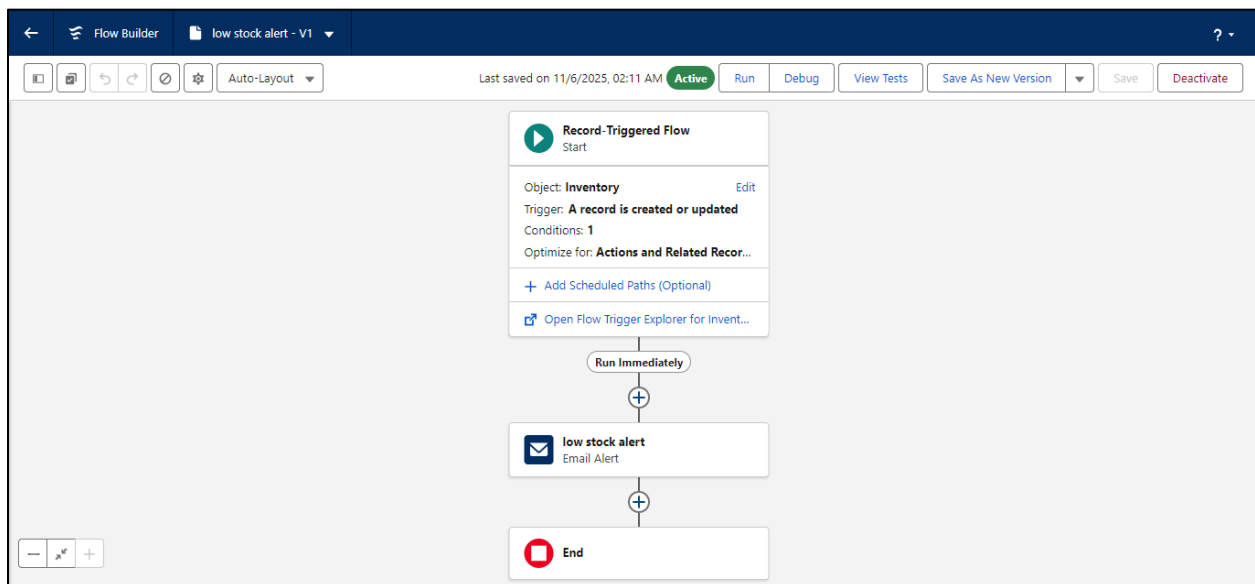
a. Order Confirmation Flow

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



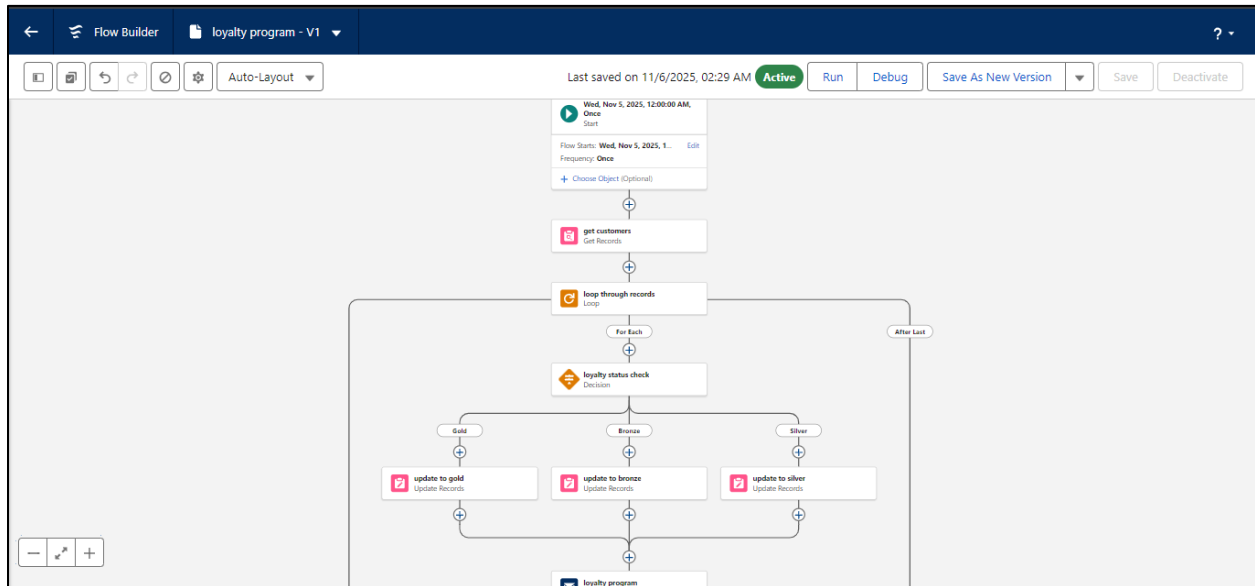
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



9. Apex Triggers

- **Order Total Trigger:** Auto-calculates Total Amount based on quantity and unit price.
- **Stock Deduction Trigger:** Reduces stock when an order is placed.
- **Loyalty Status Trigger:** Updates Loyalty Status based on total purchases.

SCREENSHOTS

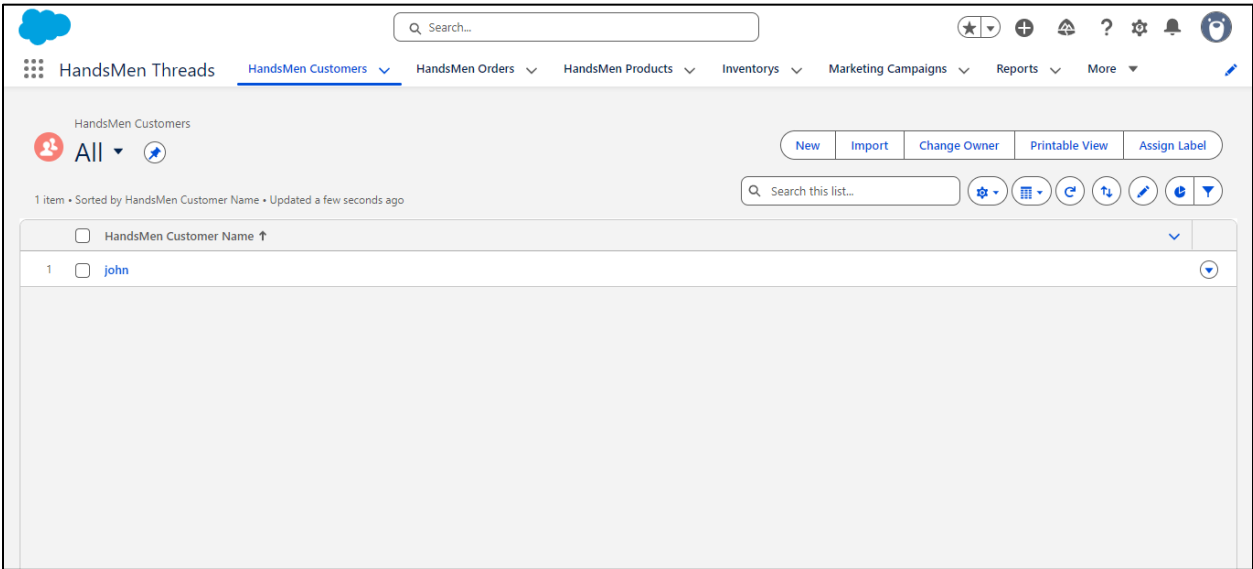


Fig: Custom App for HandsMen Threads

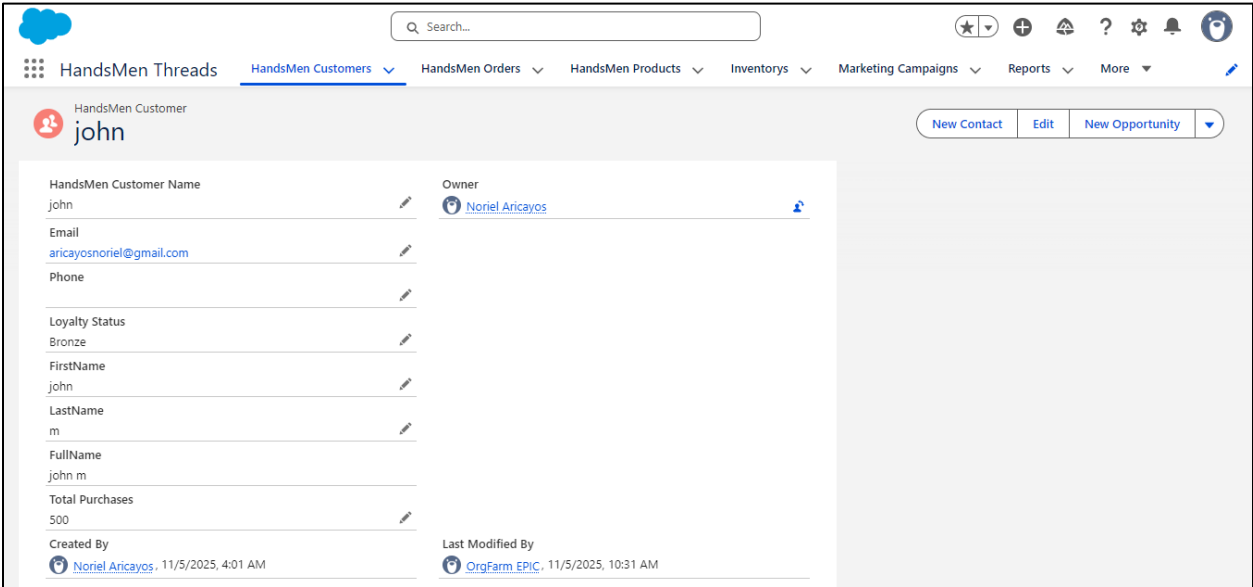


Fig: Customer Creation in HandsMen Threads

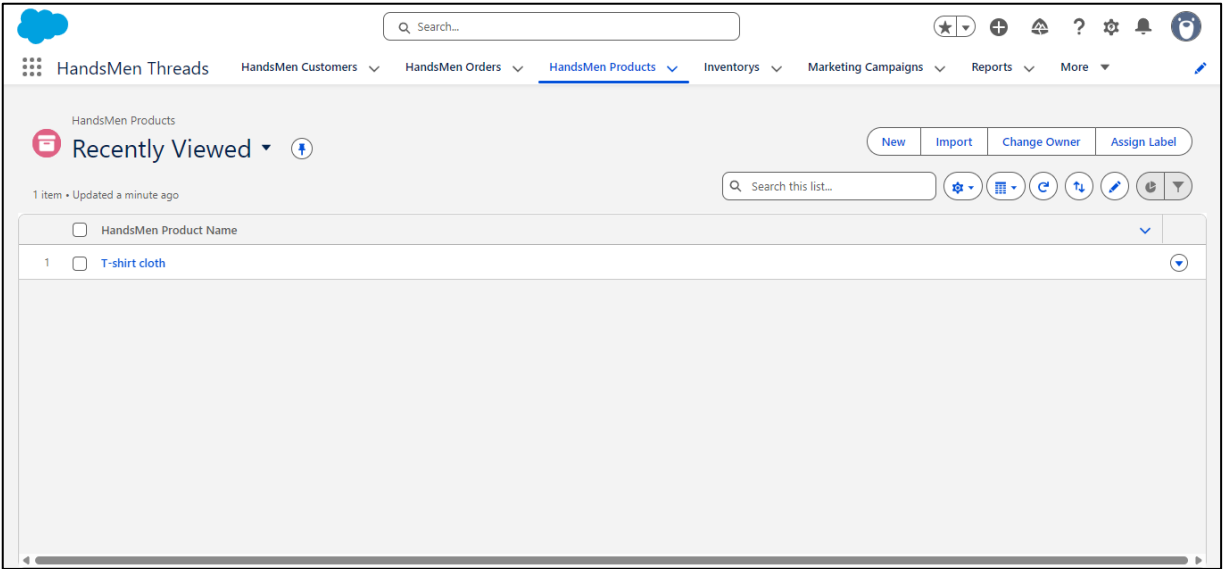


Fig: Products in HandsMen Threads

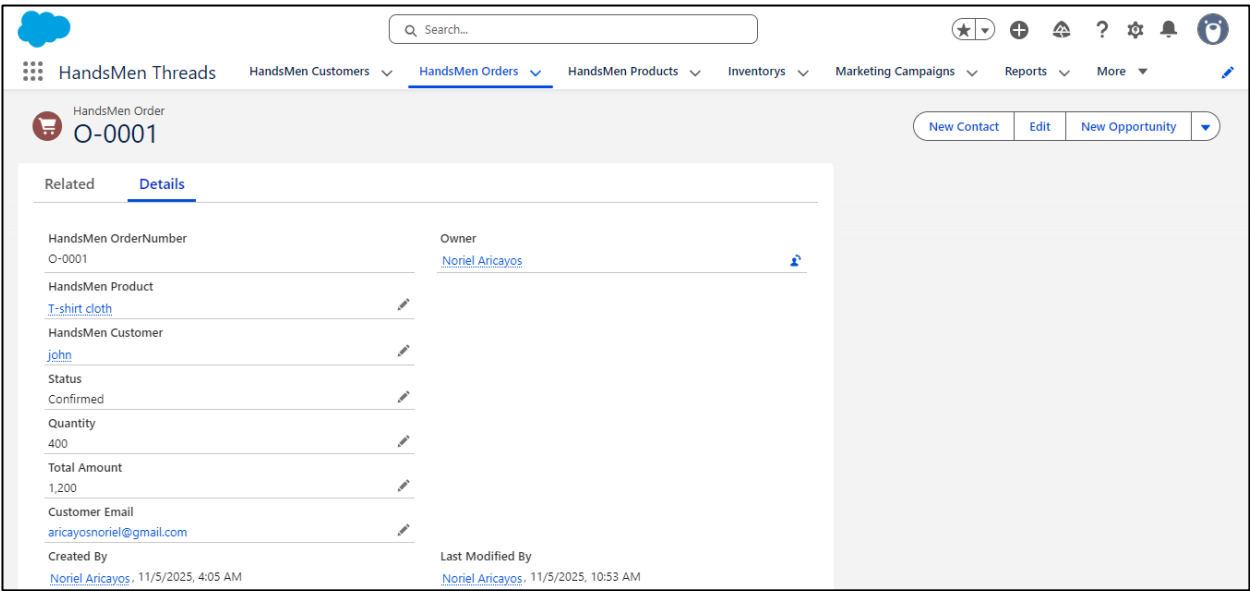


Fig: Order Confirmation

CONCLUSION

The development of the HandsMen Threads CRM system on the Salesforce platform was a success. It effectively streamlines critical business functions such as customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By utilizing Salesforce features like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system guarantees accurate data input, real-time information updates, and a significantly improved customer experience. The implementation of automation and clearly defined user roles has reduced manual errors, accelerated operations, and provided management with better insights into sales and stock performance.

Future Scope:

1. Customer Portal Integration

- Building a Customer Community where clients can log in to view their orders and track their loyalty status independently.

2. Mobile App using Salesforce Mobile SDK

- Developing a mobile interface to allow store staff to manage inventory and orders while on the move.

3. Reports & Dashboard

- Creating detailed, real-time sales and inventory dashboards for management to monitor key performance indicators and trends.

4. AI-Powered Recommendations (Einstein)

- Integrating Salesforce Einstein to provide personalized product suggestions to customers based on their past purchasing behavior.

5. WhatsApp/SMS Integration

- Setting up notifications via messaging services (WhatsApp or SMS) for order confirmations and loyalty updates.