



Republic of the Philippines

POLYTECHNIC UNIVERSITY OF THE PHILIPPINES

Office of the Vice President for Branches and Satellite Campuses

LOPEZ QUEZON BRANCH

Bachelor of Science in Information Technology

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

SUBMITTED BY:

PAULEEN JESARETH L. CONVENTO

BSIT - 3

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PROJECT OVERVIEW

This project highlights the creation of a fully tailored Salesforce CRM for HandsMen Threads, a premium menswear and bespoke tailoring brand. The initiative aimed to optimize internal workflows, enhance customer interactions, and ensure accurate, up-to-date information across all departments.

The CRM is built around a comprehensive data model comprising five core custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Key business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex, enabling features such as automatic order notifications, loyalty tier updates, and instant low-stock alerts.

To safeguard data integrity and protect sensitive information, the system incorporates strict validation rules and a department-specific security framework for Sales, Inventory, and Marketing teams. Additionally, a scheduled Apex batch job continuously monitors inventory levels and makes necessary updates in real-time.

This CRM solution significantly improved operational efficiency, enhanced customer satisfaction, and provided a scalable foundation to support future growth.

PROJECT OBJECTIVE

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The goal of this project was to design and deploy a custom Salesforce CRM for HandsMen Threads that:

Streamlines core business operations

Maintains consistent and accurate data

Elevates the overall customer experience

By centralizing management of customers, orders, products, inventory, and marketing campaigns, the CRM aims to:

Automate critical tasks such as sending order confirmations, updating loyalty levels, and triggering stock alerts

Ensure data consistency and accuracy across all departments through validation rules

Provide real-time insights into customer activity and inventory status for quicker decision-making

Improve cross-team collaboration via role-based access and permissions

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Strengthen customer loyalty through personalized communication and targeted campaigns

TECHNOLOGY OVERVIEW

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps organizations manage customer data, automate workflows, and boost sales, service, and marketing effectiveness. It offers low-code tools like Flows and advanced programmatic options like Apex for building customized business solutions.

Custom Objects

Custom Objects serve as database tables to store business-specific data. Examples include:

Customer__c – tracks customer details

Product__c – stores product information

Order__c – records customer orders

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Tabs

Tabs allow users to access and manage object records through the Salesforce interface.

Example: A Product tab provides quick access to product records.

Custom App

A Salesforce App groups related tabs and components to support a specific business area or function.

Profiles

Profiles define user access and permissions, including object-level and field-level rights.

Roles

Roles manage record visibility using the role hierarchy, supporting controlled data access and reporting.

Permission Sets

Permission Sets grant additional privileges to users without altering their primary profile.



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Validation Rules

Validation Rules enforce correct data entry before records are saved.

Examples:

Email addresses must include @gmail.com

Stock quantity cannot fall below zero

Email Templates

Preformatted emails used to communicate consistently with customers.

Example: Order Confirmation email template

Email Alerts

Automated email notifications triggered by Flows or Workflow Rules.

Example: Sending a notification when a customer's loyalty status changes

Flows

Flows automate business processes without coding, such as updating records or sending notifications.

Example: Automatically sending an order confirmation email after an order is created



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Apex

Apex is Salesforce's programming language for advanced logic and automation.

Examples:

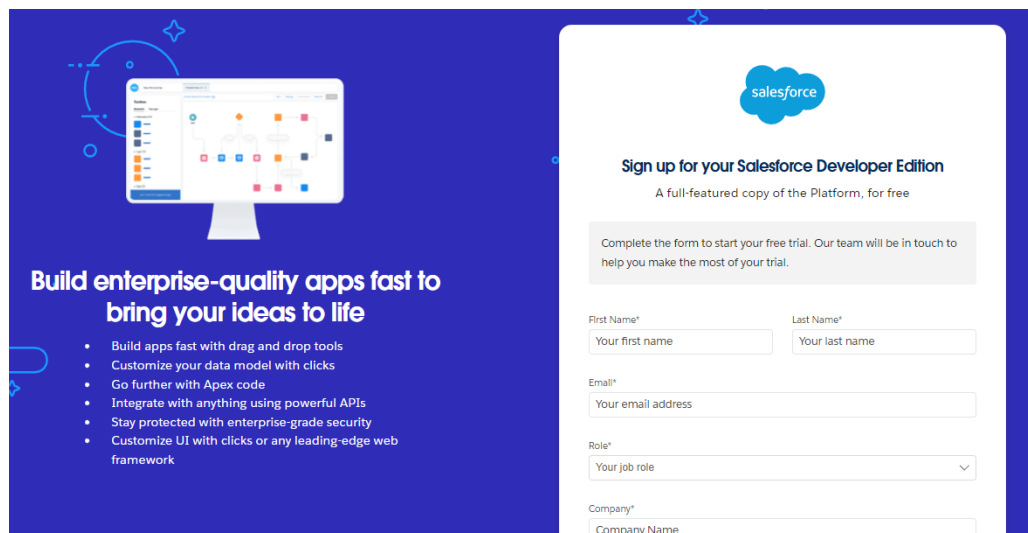
Recalculating the total order amount when items are added

Reducing inventory quantities when an order is confirmed

DETAILED EXECUTION OF PROJECT PHASE

1. Developer Org Setup A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>.

The account was verified, password set, and access was granted to the Salesforce Setup page.



2. Custom Object Creation

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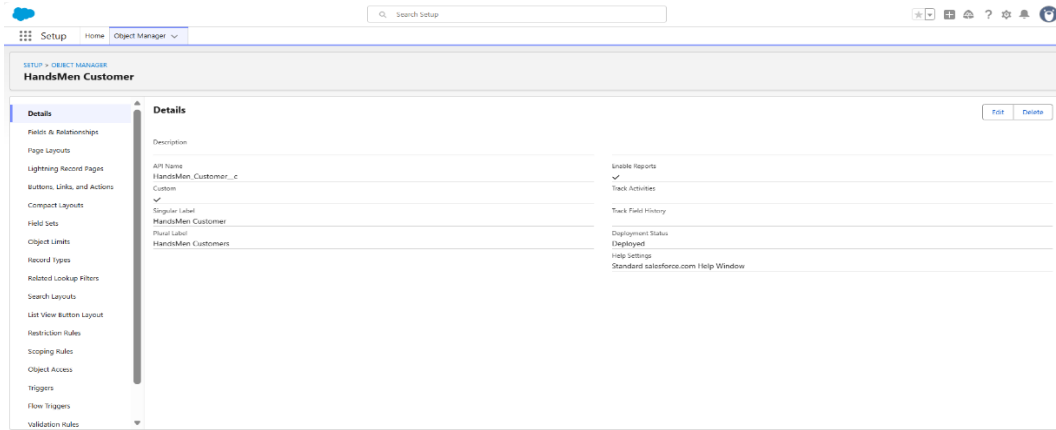
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To capture and manage key business data, five **Custom Objects** were created in **Salesforce**. Each object plays a critical role in storing and organizing information across different business functions:

- **HandsMen Customer** – Stores **customer information** such as **name, email, phone number, and loyalty status**.
 - **HandsMen Product** – Maintains **product catalog** details including **SKU, price, and available stock**.
 - **HandsMen Order** – Records **customer orders** with details like **quantity, order date, and status**.
 - **Inventory** – Tracks **stock levels** and **warehouse locations** for each product.
 - **Marketing Campaign** – Stores information about **promotional campaigns**, including **scheduling** and **target audience**.
-

Steps Followed to Create Custom Objects

1. Navigate to **Setup → Object Manager → Create → Custom Object**.
2. Enter the **Label** and **Object Name**, then enable options such as **Allow Search** and **Reports**.
3. Click **Save** to create the custom object.
4. Create a **Tab** for each object to allow easy access to its records from the **Salesforce** interface.



3. Creating the Lightning App

- A custom **Lightning App** named **HandsMen Threads** was created to centralize all key business operations.
- The app included the following **tabs**: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, Marketing Campaign, Reports, and others as needed.
- The app was **assigned** to the **System Administrator** profile for full access and management capabilities.

4. Validation Rules

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

- **Order Object** – Prevents saving an order if the **Total Amount ≤ 0** .
Error Message: "Please Enter Correct Amount"
- **Customer Object** – Validates that the **Email field contains @gmail.com**.
Error Message: "Please fill Correct Gmail"



5. User Role & Profile Setup

1. The **Standard User** profile was cloned to create a new profile named **Platform 1**, which was then granted access to all necessary custom objects.
2. **Roles** were created for different departments to control data visibility and hierarchy:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

6. User Creation

1. Users were added to Salesforce and assigned **appropriate roles and profiles** according to their responsibilities:
 - **Niklaus Mikaelson** – Assigned the **Sales Manager** role
 - **Kol Mikaelson** – Assigned the **Inventory Manager** role
2. These role-based assignments ensure **secure data access**, proper workflow control, and accurate process management within the system.



Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Enhanced Chat User Verification

User Edit

Niklaus Mikaelson

Save Save & New Cancel

General Information

First Name Niklaus

Last Name Mikaelson

Alias nmika

Email austinpineda64@gmail.com

Username austinpineda6921@gmail.com

Nickname User176354694632918696

Title

Company

Department

Division

Role Sales

User License Salesforce

Profile Platform 1

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type --None--

7. Email Templates & Alerts

- Created the following **email templates** for automated communication:
 - Order Confirmation** – Sent when an order status is updated to *Confirmed*.
 - Low Stock Alert** – Triggered when inventory levels fall below 5 units.
 - Loyalty Program Update** – Sent whenever a customer's loyalty status changes.
- Email Alerts** were configured for each template and linked to **automation flows** to ensure timely and accurate notifications.



Classic Email Templates

Email Template Detail

Email Templates from Salesforce: Unfiled Public Classic Email Templates

Field	Value	Field	Value
Email Template Name	Order Confirmation Email	Available For Use	✓
Template Unique Name	Order_Confirmation_Email	Last Used Date	
Classic Letterhead	HandsMen_Threat	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Pauleen_Jesareth Convento (Change)		
Description			
Created By	Pauleen_Jesareth Convento, 11/27/2025, 12:20 AM	Modified By	Pauleen_Jesareth Convento, 11/27/2025, 12:20 AM

Email Template

Send Text 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

8. Flow Implementations

A. Order Confirmation Flow

- Triggered automatically when an order is updated to *Confirmed*.
- Sends a personalized **Order Confirmation email** to the associated customer, ensuring they are promptly informed of their order status.



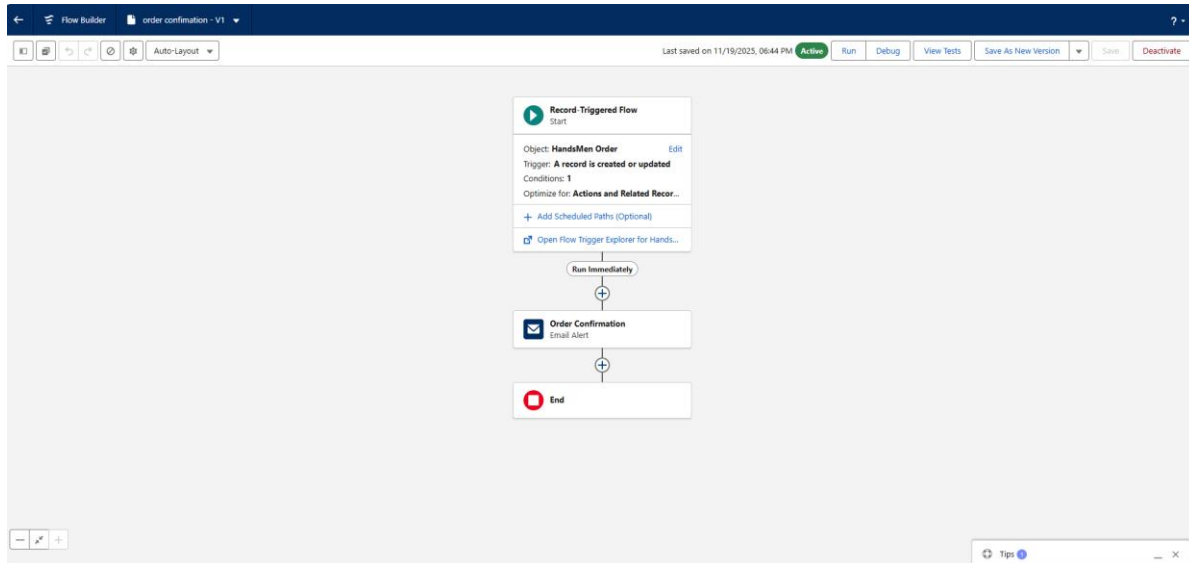
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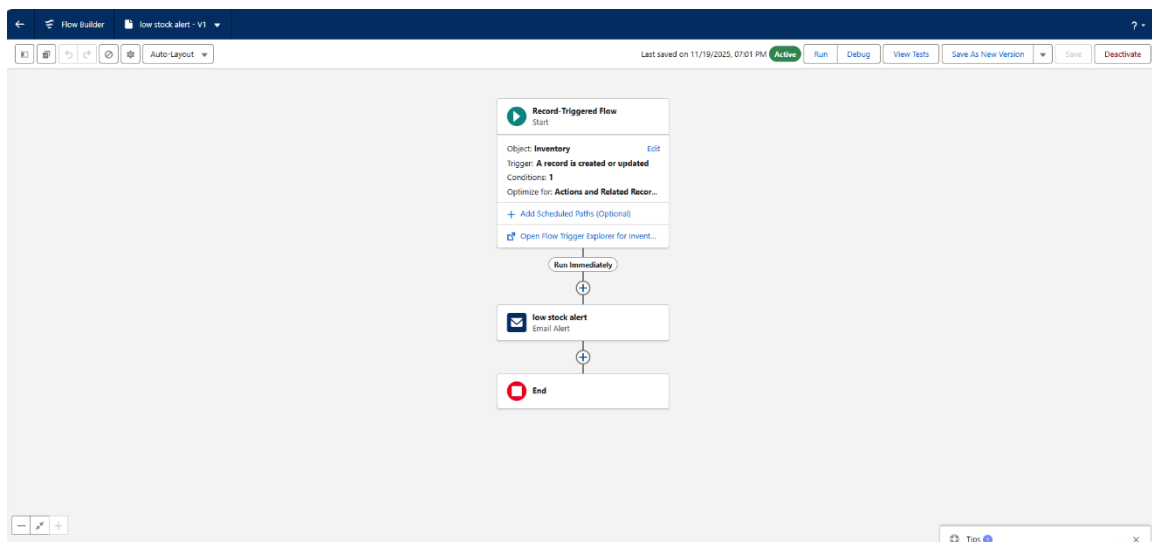
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B. Stock Alert Flow

- Triggered automatically when a product's inventory falls below 5 units.
- Sends a **Low Stock Alert email** to the **Inventory Manager** to ensure timely restocking.



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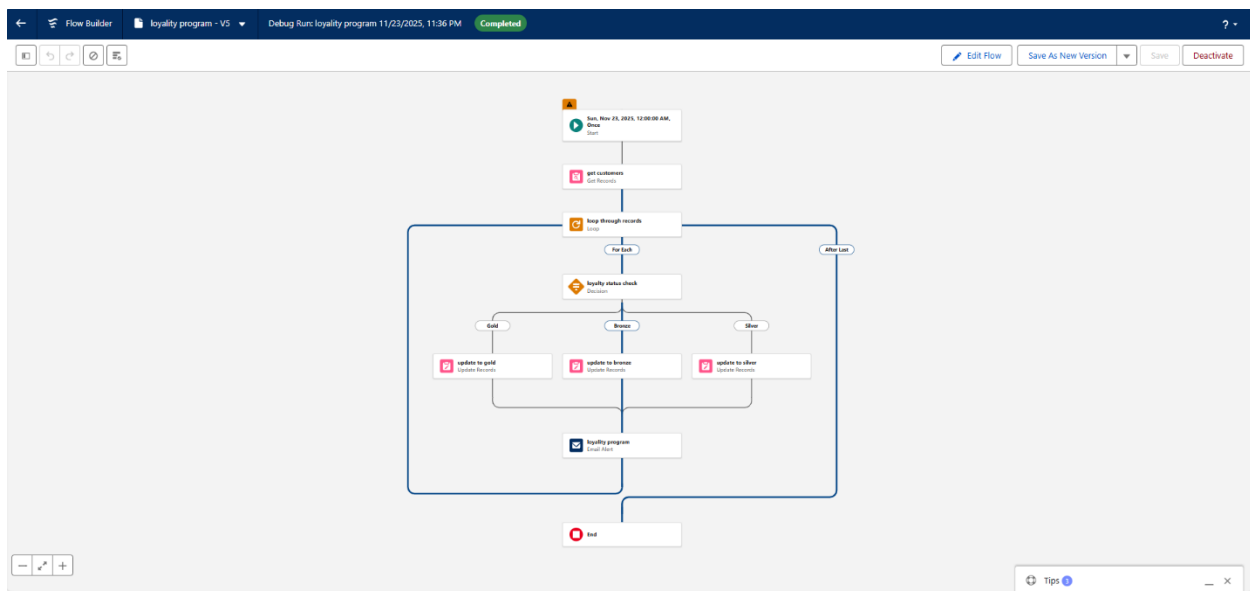
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C. Scheduled Loyalty Update Flow

- Runs **daily at midnight**.
- Iterates through all customers and updates their **Loyalty Status** based on cumulative purchases, ensuring the loyalty program is always current.



8. Apex Triggers

1. Order Total Trigger

- Automatically calculates the **Total Amount** of an order using the quantity and unit price of products.

2. Stock Deduction Trigger

- Reduces inventory stock automatically whenever an order is placed, maintaining accurate stock levels.

3. Loyalty Status Trigger

- Updates a customer's **Loyalty Status** based on their total purchases, supporting automated rewards and benefits.

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PROJECT EXPLANATION WITH REAL WORLD EXAMPLE

Customer Journey in the Salesforce CRM System

1. Customer Registration

- A customer, **Elijah Mikaelson**, visits the physical store or the online website.
- A **Customer record** is created in Salesforce containing his name, phone number, email, and other personal details.
- **Validation Rule:** Ensures the email address is correctly formatted (e.g., must include @gmail.com).

2. Product Setup

- The admin adds products, such as **Shirts** and **Jeans**, into the **Product__c** object.
- Each product record includes details like price, SKU, and description.
- Corresponding **Inventory records** are created to monitor stock levels for each product.

3. Order Placement

- Elijah decides to purchase **2 shirts (₱2500 each)**.
- A new **Order record** is created in Salesforce.
- **Apex Trigger:** Automatically calculates the **Total Amount**.
 - Example calculation: $2 \times \text{₱}2500 = \text{₱}5000$

4. Inventory Update

- Once the order is placed:
 - **Inventory Trigger:** Reduces the stock of shirts by 2.
 - **Validation Rule:** Ensures inventory cannot drop below zero, preventing negative stock.

5. Loyalty Program

- Elijah's total purchase now amounts to **₱5000**.

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- A **Customer Apex Trigger** evaluates total purchases and updates loyalty status based on predefined thresholds:
 - < ₱500 → Bronze
 - ₱500–₱1000 → Silver
 - > ₱1000 → Gold
- In this scenario, Elijah is upgraded to **Silver** status.

6. Email Notifications

- Whenever a new order is placed or a loyalty status changes:
 - **Flow + Email Alert** is triggered.
 - Elijah receives a notification, e.g.:

“Thank you for your purchase! Your loyalty status is now Silver.”

7. Users and Roles

- Salesforce users are created for staff, with **roles and profiles** assigned according to responsibilities:
 - **Niklaus Mikaelson** – Sales Role (Platform 1 Profile)
 - **Kol Mikaelson** – Inventory Role (Platform 1 Profile)



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SCREENSHOTS

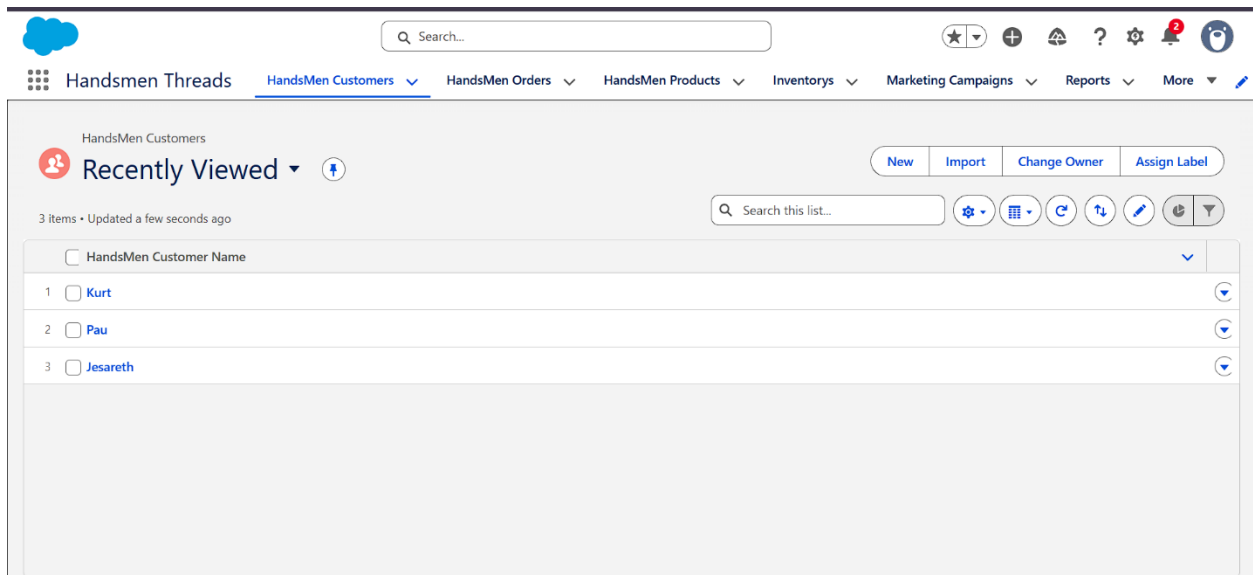


FIG: CUSTOM APP FOR HandsMen Threads

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The screenshot shows the 'HandsMen Threads' interface with the 'HandsMen Customers' tab selected. The customer details for 'Pau' are displayed in a table-like format. The table has two columns: 'HandsMen Customer Name' and 'Owner'. The 'HandsMen Customer Name' column contains fields for Email, Phone, Loyalty Status, FirstName, LastName, FullName, Total Purchases, and Created By. The 'Owner' column contains the field for 'Owner'. The 'Created By' field is populated with 'Pauline Jansen Convento' and the 'Last Modified By' field is populated with 'Orghem EPIC'.

HandsMen Customer Name	Owner
Pau	Pauline Jansen Convento
Email	
Phone	
Loyalty Status	
FirstName	
LastName	
FullName	
Total Purchases	
Created By	Last Modified By
Pauline Jansen Convento	Orghem EPIC

FIG: CUSTOMER CREATION IN HandsMen Threads

The screenshot shows the 'HandsMen Threads' interface with the 'HandsMen Products' tab selected. The 'Recently Viewed' section is active, showing a list of products. The list has two columns: 'HandsMen Product Name' and 'Status'. The 'HandsMen Product Name' column contains fields for 'Short' and 'T-shirt Cloth'. The 'Status' column contains a 'New' button and a 'Change Owner' button. The 'Assign Label' button is also visible.

HandsMen Product Name	Status
Short	New
T-shirt Cloth	Change Owner

FIG: PRODUCTS IN HandsMen Threads



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Related	Details
HandsMen Order Number	O-0005
HandsMen Product	Short
HandsMen Customer	Kurt
Status	Confirmed
Quantity	20
Total Amount	60
Customer Email	jesarethconvento517@gmail.com
Created By	Pauleen Jesareth Convento
Last Modified By	Pauleen Jesareth Convento

FIG: ORDER CONFIRMATION

4 of 12

← Delete forever | Not spam | ✉ | 📁 | ⋮

Your Order has been Confirmed! Spam x

Pauleen Jesareth Convento via oylw7xgrm6kag.gl-foumluar.can98.bnc.salesforce.com to me Thu, Nov 27, 5:41 PM (22 hours ago) ☆ ☹ ↶ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Dear Kurt,

Your order #O-0005 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

FIG: ORDER CONFORMATION EMAIL



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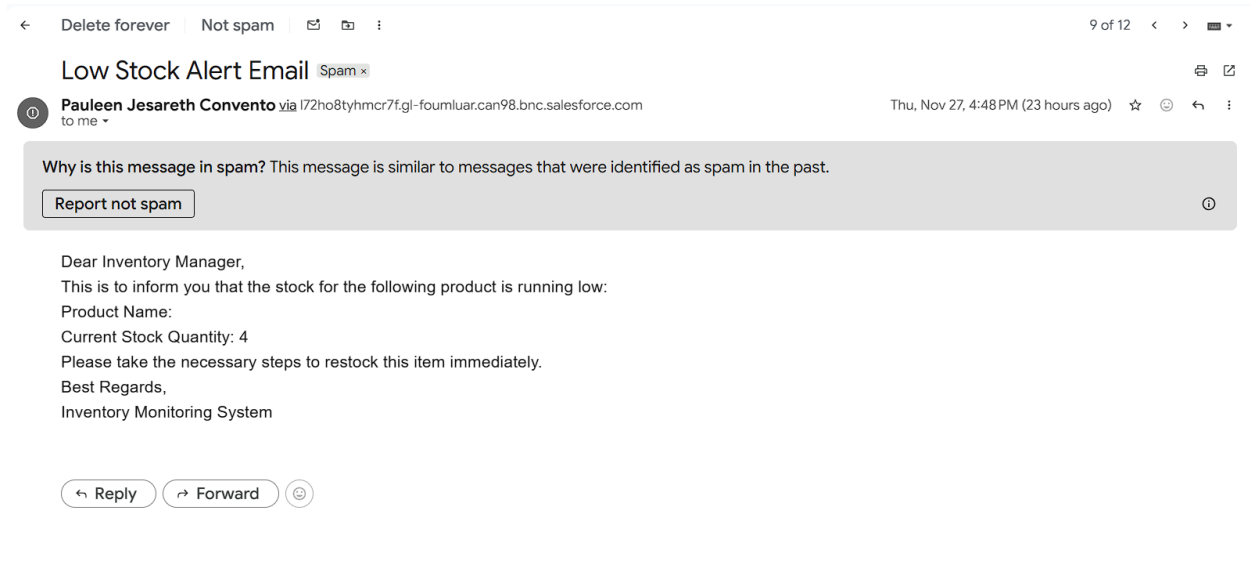


FIG: LOW STOCK ALERT EMAIL

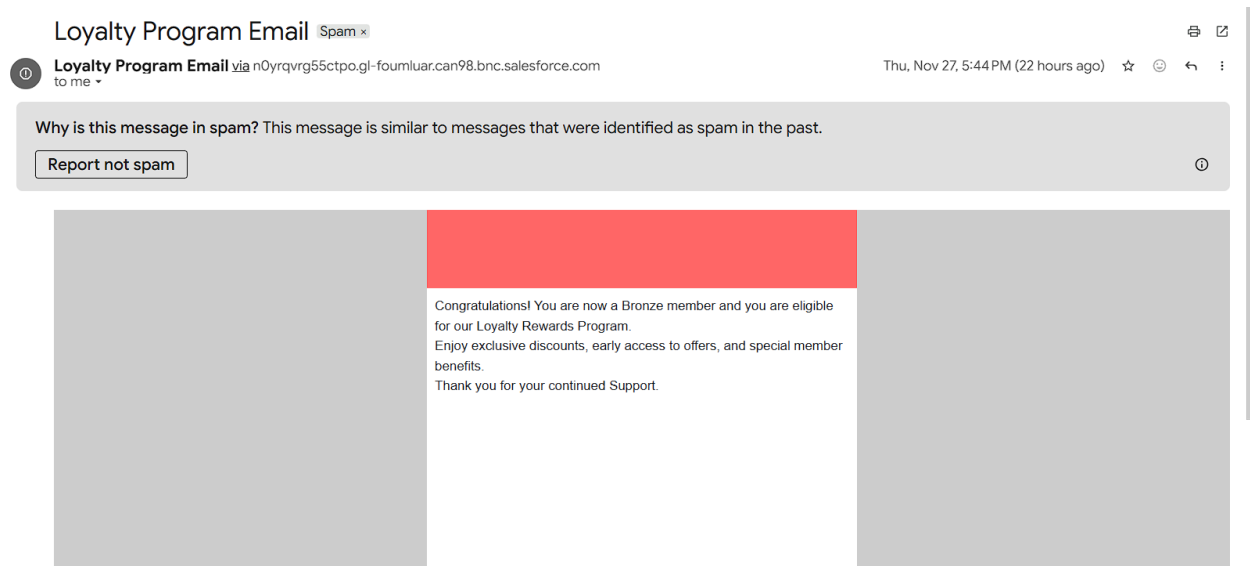


FIG: LOYALTY PROGRAM EMAIL

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CONCLUSION

IMPLEMENTATION SUMMARY

The customized Salesforce CRM for **HandsMen Threads** successfully streamlined business operations, improved data accuracy, and enhanced customer engagement. By centralizing key objects—**Customers, Products, Orders, Inventory, and Marketing Campaigns**—the system provides an organized and efficient framework for managing core business processes.

Automation through **Flows, Apex Triggers, and Email Alerts** has reduced manual tasks, ensured timely notifications, and maintained precise inventory and loyalty records. **Role-based access controls and profiles** safeguard sensitive data while promoting seamless collaboration across teams.

Overall, this CRM solution delivers a **scalable, robust foundation** that supports the company's growth and improves the overall customer experience.

FUTURE SCOPE

The Salesforce CRM for HandsMen Threads can be further enhanced with the following improvements:

1. **Mobile Integration:** Allow sales staff and managers to access the CRM on mobile devices to update orders, check inventory, and interact with customers anytime, anywhere.
2. **Advanced Analytics & Reporting:** Implement dynamic dashboards and AI-powered insights to track sales trends, forecast inventory needs, and analyze customer behavior.
3. **E-commerce Integration:** Connect the CRM with online stores for **real-time order management** and automated inventory updates.
4. **Enhanced Loyalty Programs:** Introduce tiered rewards, automated promotions, and personalized offers tailored to customer preferences.
5. **Chatbots & Customer Self-Service:** Provide automated support for inquiries, order tracking, and product recommendations, enhancing customer convenience.
6. **Marketing Automation:** Expand campaign management with targeted email campaigns, social media integration, and performance tracking.

These enhancements will further **optimize business operations, elevate customer satisfaction, and enable scalable growth** for HandsMen Threads.

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