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**POLYTECHNIC UNIVERSITY OF THE PHILIPPINES**

Office of the Vice President for Branches and Satellite Campuses

**LOPEZ QUEZON BRANCH**

**Bachelor of Science in Information Technology**

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

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## **Project Overview**

HandsMen Threads is high-end and luxury organization in the fashion industry, currently they are in a transition to implement transformative Salesforce solutions to streamline data management, ensure data integrity, and elevate customer relationships in the fashion industry. The project establishes a comprehensive data model to centralize all business data, enabling seamless information flow and supporting data-driven decision-making across the organization.

The HandsMen Thread tailored CRM includes primary custom objects such as Customer, Order, Product, Inventory, and Marketing Campaign. It also utilizes key business activities automations using custom flows such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers.

This project maintains its integrity and security of data by including role-based security model suited for Marketing, Sales, and Inventory and by also applying strict data validation rules. It also encompasses an Apex process to manage and monitor the stocks in the inventory.

Overall, this project focuses on establishing a robust Salesforce data model and implementing key automated processes to centralize all business data, enhance customer relations, and drive data-driven decision-making for HandsMen Threads.

## **Objective**

The primary objective of this project is to provide the organization a platform that streamlines the business flow, implements strict data security, and enhances customer relationship.

To achieve this goal, the core objectives of this project are:

- **Centralize Data:** Establish a comprehensive, unified data model for all business data to ensure seamless information flow.
- **Enhance Data Integrity:** Implement features to maintain the **accuracy and consistency of data** directly from the user interface (UI).
- **Improve Customer Relations:** Introduce automated processes to increase engagement and provide personalized customer experiences.
- **Boost Operational Efficiency:** Automate internal workflows, such as stock alerts and bulk order processing, to optimize operations.



## **Technology Used with Description**

### **Salesforce**

Salesforce is a leading American cloud-based software company best known for its Customer Relationship Management (CRM) platform. It provides a wide range of applications that help businesses connect with their customers and manage key aspects of their operations, including sales, customer service, marketing, and e-commerce, all through the internet (the cloud).

### **Custom Objects**

Custom objects are created to be used by a business-specific information.

Examples:

- HandsMen\_Customer\_\_c
- HandsMen\_Order\_\_c
- HandsMen\_Product\_\_c
- Inventory\_\_c

### **Profiles**

A Profile is a fundamental and mandatory component of the security and user access model. It essentially controls the functional access and user interface settings for a group of users.

Example:

- Platform 1

### **Roles**

A Role is a security and access feature that primarily controls what data a user can see in the organization, specifically at the record level. It is used to create a Role Hierarchy that mirrors your company's organizational chart, often used to determine data sharing and reporting structure.

Example:

- Sales
- Marketing
- Inventory



## **Permission Sets**

A Permission Set is a collection of settings and permissions that allows administrators to extend a user's functional access without changing their assigned Profile.

Example:

- Sales Permission Set
- Marketing Permission Set
- Inventory Permission Set

## **Validation Rules**

Validation Rules are essential tools used to verify that the data a user enters into a record meets specific standards before they can successfully save the record.

Example:

- Email must contain “@gmail.com”
- Stock cannot be 0
- Amount cannot be 0

## **Email Templates**

An Email Template is a pre-designed, reusable structure for composing emails sent from the platform.

Example:

- Order Confirmation Email
- Low Stock Alert Email
- Loyalty Program Email

## **Email Alerts**

An Email Alert is a reusable configuration that defines the email message, its recipients, and the sender, but does not define when the email is sent.

Example:

- Order Confirmation Email Alert – sent when an order is placed.
- Low Stock Email Alert – sent when stock quantity drops less than 5.



## Flows

Flow is an application that automates complex business processes by collecting data and then performing actions with that data, all without the need to write traditional code.

Example:

- Order Confirmation Flow (Record-Triggered Flow) – triggered when order status is confirmed.

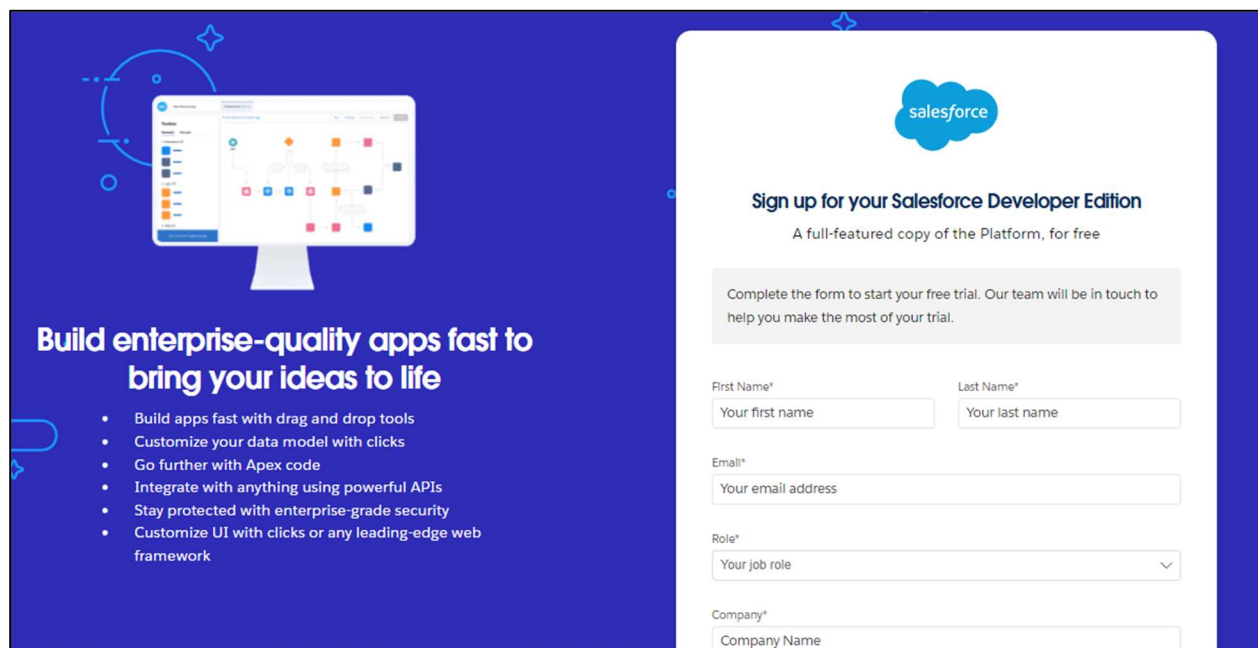
## Apex

Apex is used when the complexity of a business rule or the need for integration exceeds the capabilities of declarative tools

## Execution of Project Phase

1) A Salesforce Developer Org was created through the link:

<https://developer.salesforce.com/signup>



2) Custom Object Creation

- HandsMen Customer – stores customer information such as name, email, phone, and loyalty status.
- HandsMen Product – stores product catalog details such as SKUs, price, and available stock.



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- HandsMen Order – records customer order information that includes details such as customer name, product, quantity, status, and order date.
- Inventory – monitors and tracks each product’s stock quantity and warehouse location.
- Marketing Campaign – stores details such as schedule and target audience of a campaign.

### 3) Creating the Lightning App

- Create a custom lightning app that is named HandsMen Threads to centralized all operations.
- Its tab includes: HandsMen Order, HandsMen Product, HandsMen Customer, Inventory, Marketing Campaign, Reports, and others.
- This app is assigned to a System Administrator.

### 4) Validation Rules

This ensures data integrity and enhances data accuracy. Some of the rules implemented are:

- In Customer Object, email field is validated

The screenshot shows a web form titled "New HandsMen Customer". It includes a legend indicating that an asterisk (\*) denotes required information. The form is divided into sections: "Information" (with fields for HandsMen Customer Name, Email, Phone, Loyalty Status, FirstName, LastName, and Total Purchases) and "Owner" (with a field for the owner's name). The "Email" field contains the value "thegoat" and is highlighted with a red border and a red error message: "We hit a snag. Review the following fields: Email". The "Phone" field contains the value "1234567890". The "Loyalty Status" field is a dropdown menu with the value "--None--". The "FirstName" field contains the value "Lionel" and the "LastName" field contains the value "Messi". The "Total Purchases" field is empty. The "Owner" field contains the value "Lawrence Shane Joshua Lim". At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

Fig: Customer Object Email Field Validation Rule

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## 5) Role and Profile Setup

- Roles were created for different departments, this are:
  - Sales
  - Marketing
  - Inventory
- The Profile named 'Platform 1' was created from the clone of 'Standard User', this gives access to necessary custom object.

**Platform 1**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

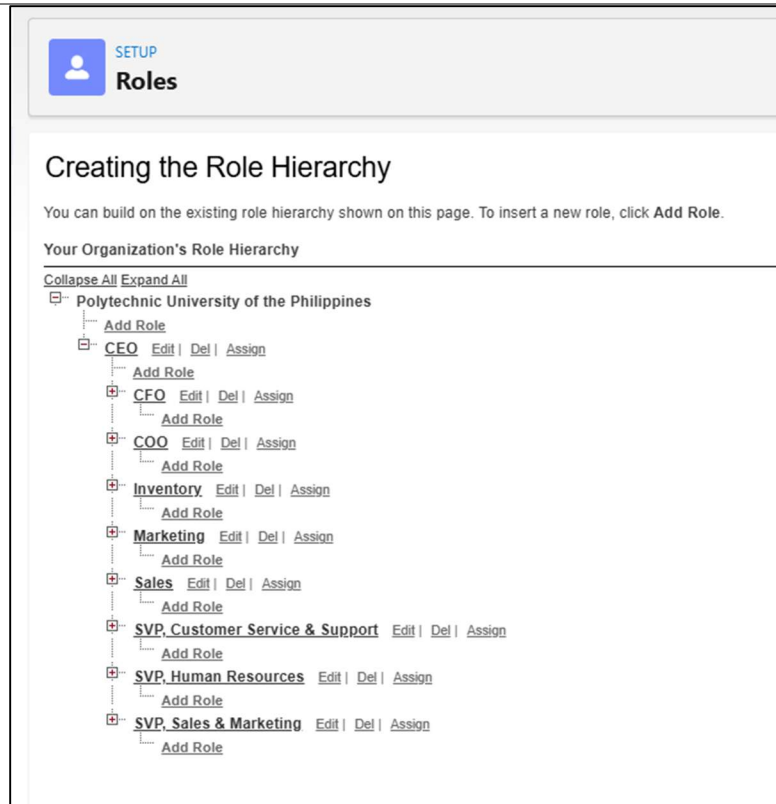
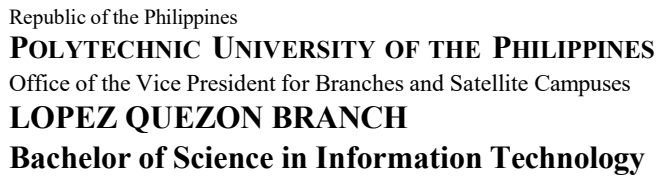
**Profile Detail**

Name	Platform 1	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Lawrence Shane Joshua Lim	Modified By	Lawrence Shane Joshua Lim
	11/26/2025, 4:59 AM		11/26/2025, 7:18 AM

**Page Layouts**

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Global	<a href="#">Global Layout</a>		<a href="#">Location Group Assignment Layout</a>
Email Application	<a href="#">Not Assigned</a>	Macro	<a href="#">Macro Layout</a>
Home Page Layout	<a href="#">Home Page Default</a>	Object Milestone	<a href="#">Object Milestone Layout</a>
Account	<a href="#">Account Layout</a>	Operating Hours	<a href="#">Operating Hours Layout</a>
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a>	Opportunity	<a href="#">Opportunity Layout</a>
Appointment Invitation	<a href="#">Appointment Invitation Layout</a>	Opportunity Product	<a href="#">Opportunity Product Layout</a>
Asset	<a href="#">Asset Layout</a>	Order	<a href="#">Order Layout</a>
Asset Action	<a href="#">Asset Action Layout</a>	Order Product	<a href="#">Order Product Layout</a>
Asset Action Source	<a href="#">Asset Action Source Layout</a>	Payment	<a href="#">Payment Layout</a>
Asset Relationship	<a href="#">Asset Relationship Layout</a>	Payment Authorization	<a href="#">Payment Authorization Layout</a>
Asset State Period	<a href="#">Asset State Period Layout</a>	Payment Authorization Adjustment	<a href="#">Payment Authorization Adjustment Layout</a>
Assigned Resource	<a href="#">Assigned Resource Layout</a>	Payment Gateway	<a href="#">Payment Gateway Layout</a>
Associated Location	<a href="#">Associated Location Layout</a>	Payment Gateway Log	<a href="#">Payment Gateway Log Layout</a>

Fig: Profile Platform 1







## 6) Create Users

- Users were added and given a profile and role that grants access and proper control

**SETUP Users**

User: **Kol Mikaelson**

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Memberships \(0\)](#) | [Queue Memberships \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [Chatter Areas \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(24\)](#) | [User Provisioning Accounts \(0\)](#)

**User Detail** [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Kol Mikaelson	Role	<a href="#">Inventory</a>
Alias	kmika	User License	Salesforce
Email	joshualim142@gmail.com <a href="#">Verify</a>	Profile	<a href="#">Platform 1</a>
Username	joshualim142@green112625gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	kmikaelson	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">1</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">1</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">1</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">1</a>
App Registration: One-Time Password Authenticator	<a href="#">1</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">1</a>
App Registration: Salesforce Authenticator	<a href="#">1</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<a href="#">1</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<a href="#">1</a>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)		Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/> <a href="#">1</a>
		Call Center	
		Phone	
		Extension	
		Fax	

Fig: Setup Users

## 7) Create Classic Letterhead, Email Template, and Email Alerts

- Create and design Classic Letterhead
- Create the following Email Template and integrate the Classic Letterhead as needed:
  - i) Order Confirmation Email
  - ii) Low Stock Alert Email
  - iii) Loyalty Program Email
- Configure Email Alerts and integrate with flows.



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**Classic Letterheads**

Letterhead: **Handsomen Threads**

Preview your Letterhead details below.

**Classic Letterhead Detail**

Letterhead Label: Handsomen Threads  
Letterhead Unique Name: Handsomen\_Threads  
Available For Use: ☒  
Description:   
Created By: Lawrence Shane Joshua Lim 11/26/2025, 5:21 AM  
Modified By: Lawrence Shane Joshua Lim 11/26/2025, 5:28 AM

Buttons: Edit Properties, Edit Letterhead, Delete

Preview: A vertical rectangle with a blue header and footer, and a white body.

Fig: Setup Classic Letterhead

**Classic Email Templates**

HTML Email Template: **Order Confirmation Email**

Preview your email template below.

**Email Template Detail**

Email Templates from Salesforce: Unfiled Public Classic Email Templates  
Email Template Name: Order Confirmation Email  
Template Unique Name: Order\_Confirmation\_Email  
Classic Letterhead: Handsomen Threads  
Email Layout: Free Form Letter  
Encoding: Unicode (UTF-8)  
Author: Lawrence Shane Joshua Lim (Change)  
Description:   
Created By: Lawrence Shane Joshua Lim 11/26/2025, 5:26 AM  
Modified By: Lawrence Shane Joshua Lim 11/26/2025, 5:27 AM

Buttons: Edit Properties, Edit HTML Version, Edit Text Version, Delete, Clone

Available For Use: ☒  
Last Used Date:   
Times Used:

**Email Template**

Send Text and Verify Merge Fields

Subject: Your Order has been Confirmed!

HTML Preview: A vertical rectangle with a blue header and a white body containing the text: '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'.

Fig: Setup Email Template



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**SETUP**  
**Email Alerts**

Email Alert  
Order Confirmation Email Alert

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

**Email Alert Detail**

Description	Order Confirmation Email Alert	Email Template	Order Confirmation Email
Unique Name	Order_Confirmation_Email_Alert	Object	HandsMen Order
From Email Address	Current User's email address		
Recipients	Email Field: Customer Email		
Additional Emails			
Created By	Lawrence Shane Joshua Lim, 11/26/2025, 5:35 AM	Modified By	Lawrence Shane Joshua Lim, 11/26/2025, 5:35 AM

**Rules Using This Email Alert**  
This alert is currently not used by any rules

**Approval Processes Using This Email Alert**  
This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**  
This alert is currently not used by any entitlement processes

**Flows Using This Email Alert**

Flow Name	Version	Description	Object	Active
Order Confirmation Flow	1	Order Confirmation Flow	019L00003CeCr	✓

Always show me more records per related list

Fig: Setup Email Alert

## 8) Flow Integrations

- Order Confirmation Flow (Record-Triggered Flow) – sends a customized email to the customer that confirms their order details and status.

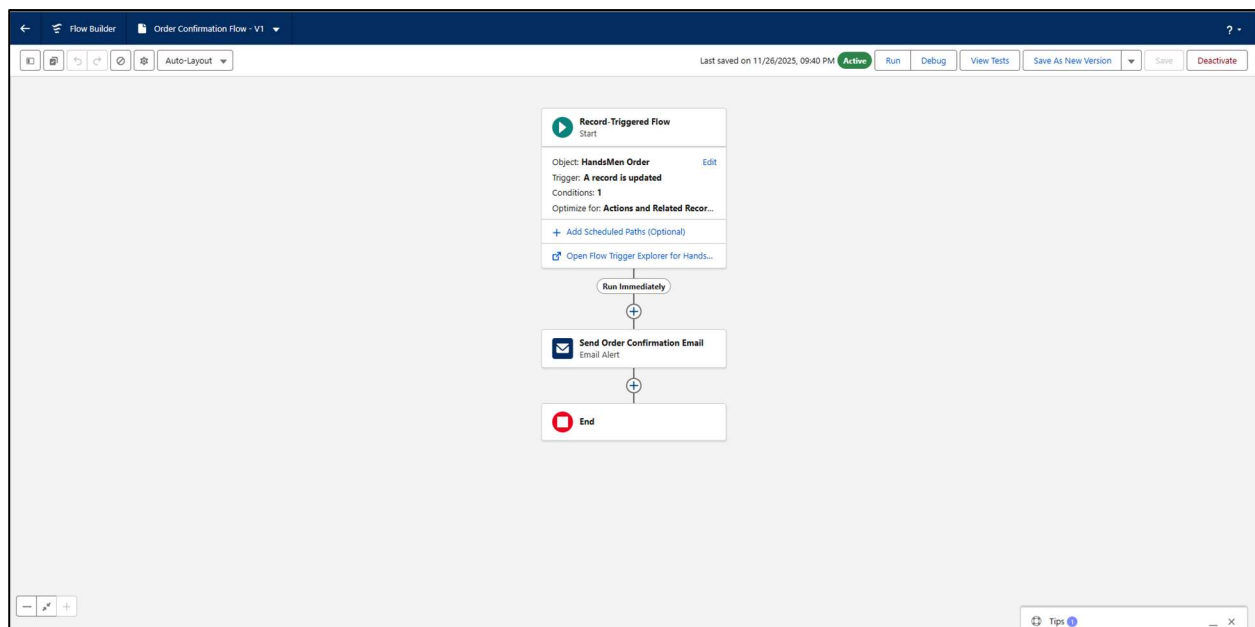


Fig: Order Confirmation Flow

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- Stock Alert Flow (Record-Triggered Flow) – sends an email alerting when stock quantity in inventory drops less than 5.

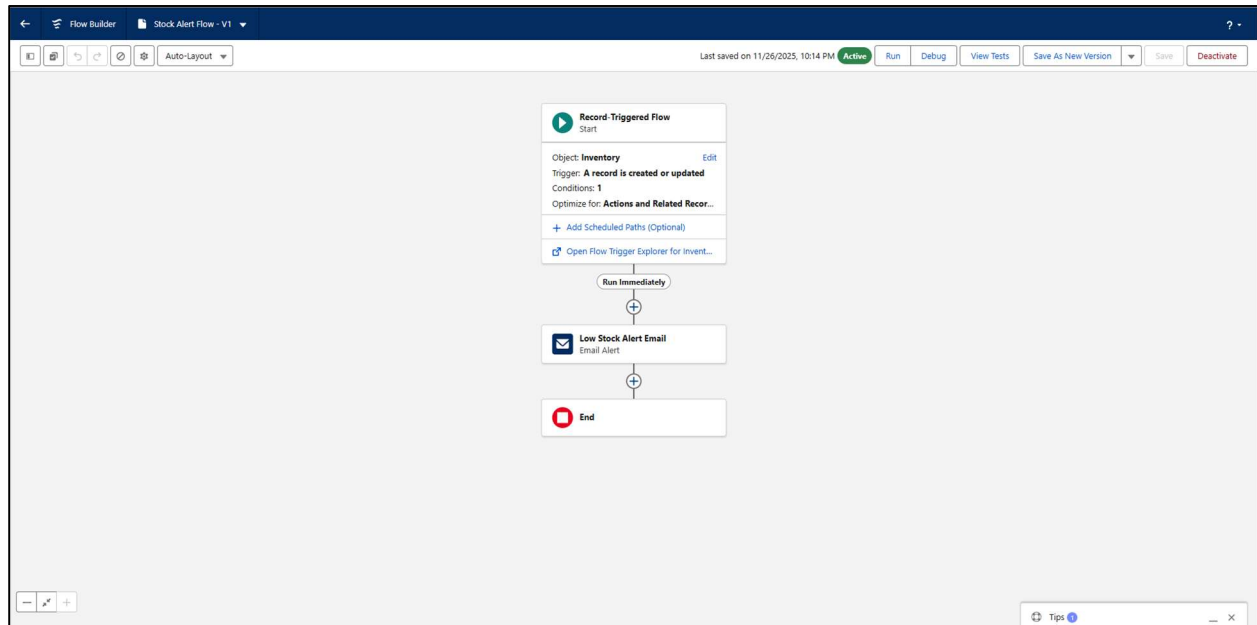


Fig: Stock Alert Flow



- Loyalty Status Update Flow – this flow sends a personalized email to a customer that is qualified for a certain level of the loyalty program.

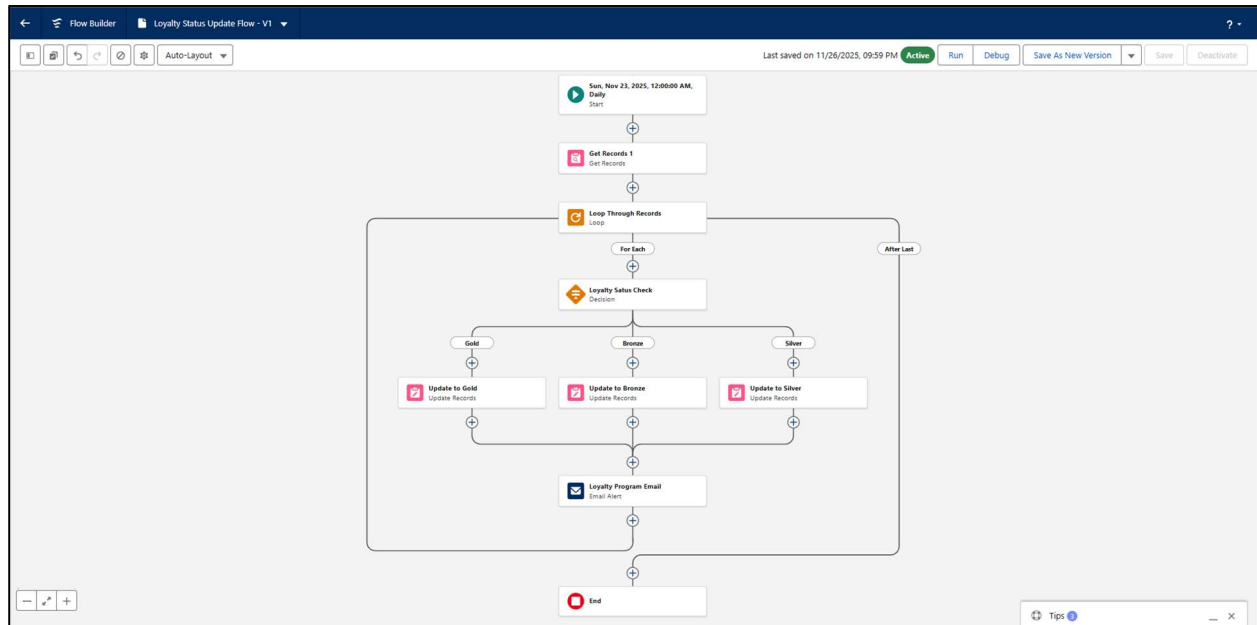


Fig: Loyalty Status Update Flow

## 9) Create Apex Triggers

- Update Order Total – Object: Order

This auto-update the total amount based on the quantity and product price when saved.

- Stock Deduction – Object: Inventory

This reduces the stock quantity in inventory when the order status is updated to confirmed.



## Screenshots

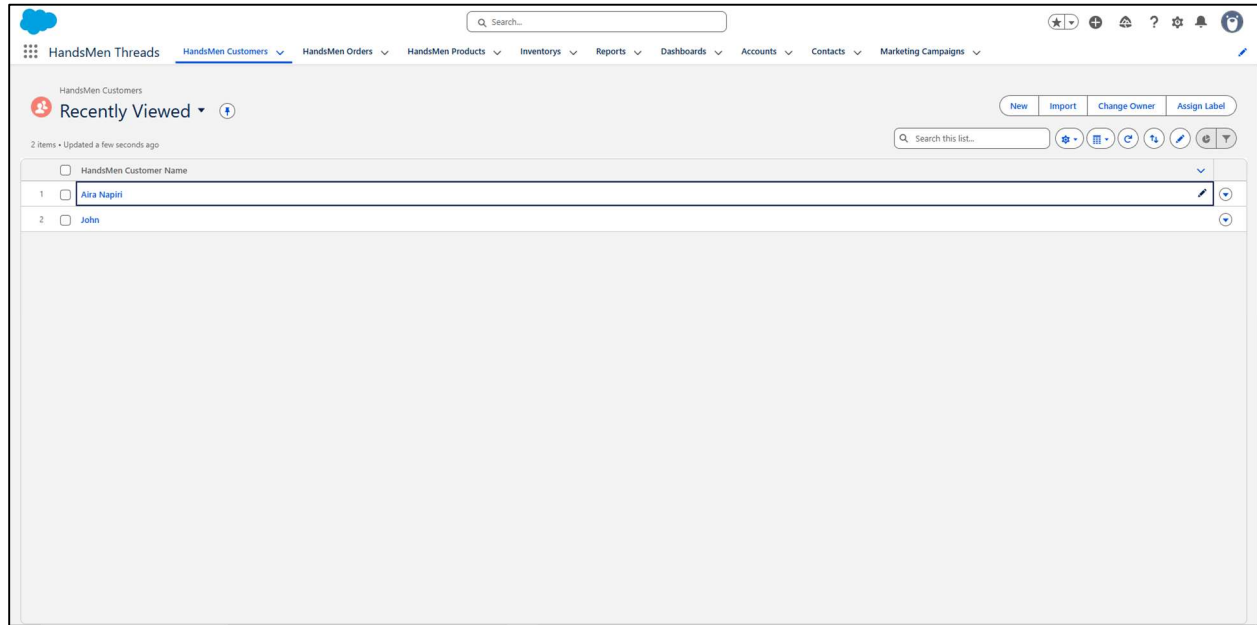


Fig: HandsMen Threads Lightning App

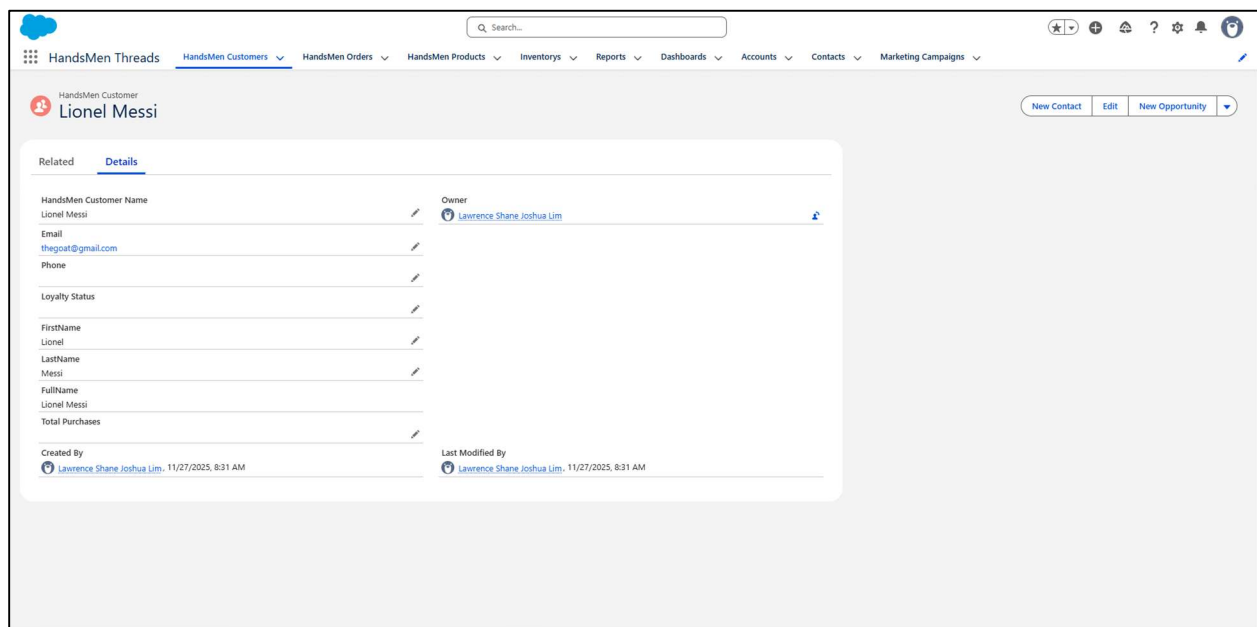


Fig: HandsMen Thread Customer Details

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The screenshot shows the 'HandsMen Threads' product details page. The breadcrumb trail is: HandsMen Threads > HandsMen Customers > HandsMen Orders > HandsMen Products > T-shirt. The page title is 'HandsMen Product T-shirt'. There are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

Field	Value
HandsMen Product Name	T-shirt
SKU	12938746
Price	\$210
Stock Quantity	15
Created By	Lawrence Shane Joshua Lim - 11/26/2025, 6:14 AM
Last Modified By	Lawrence Shane Joshua Lim - 11/27/2025, 8:32 AM

Fig: HandsMen Thread Product Details

The screenshot shows the 'HandsMen Threads' inventory details page. The breadcrumb trail is: HandsMen Threads > HandsMen Customers > HandsMen Orders > HandsMen Products > Inventory > I-0001. The page title is 'Inventory I-0001'. There are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

Field	Value
Inventory Number	I-0001
HandsMen Product	T-shirt
Stock Quantity	15
Stock Status	Available
Warehouse	
Created By	Lawrence Shane Joshua Lim - 11/26/2025, 6:15 AM
Last Modified By	Lawrence Shane Joshua Lim - 11/27/2025, 8:33 AM

Fig: HandsMen Thread Inventory Details



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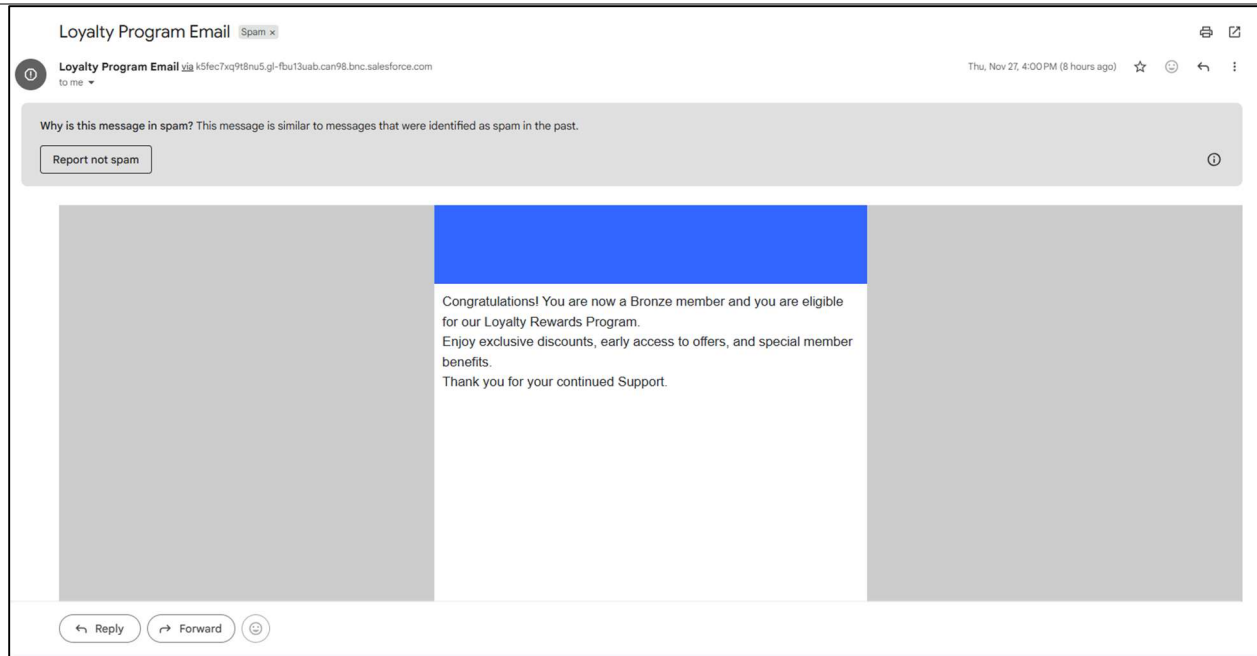


Fig: Loyalty Program Email

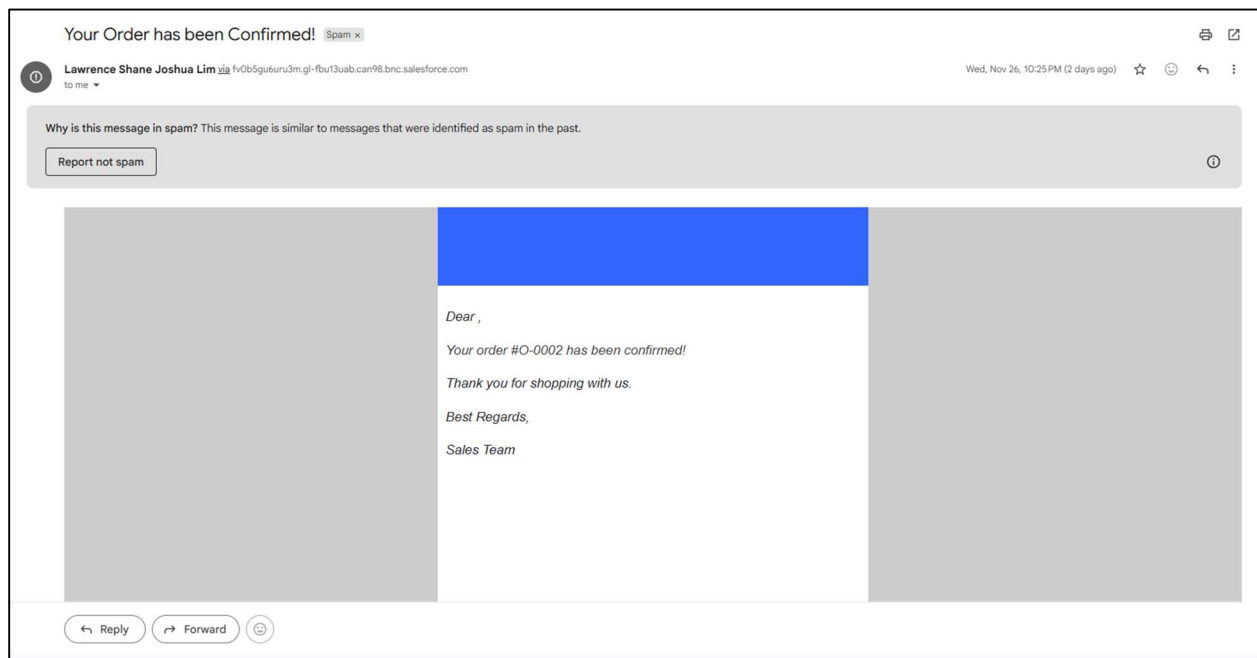


Fig: Order Confirmation Email





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Fig: Low Stock Email

## Conclusion

The goal of the HandsMen Threads Salesforce project is to centralize all business data and integrate automation into key processes in order to provide the groundwork for future expansion.

A comprehensive, high-integrity data model that directly supports data-driven decision-making will be the outcome of this project's successful execution. Concurrently, the implementation of procedures such as Order Confirmation Emails, Loyalty Program, and Proactive Stock Alerts will maximize operational efficiency (particularly inventory management and order fulfillment) and greatly improve consumer involvement.

Essentially, this project provides HandsMen Threads with the technological architecture required to guarantee data correctness, promote better customer connections, and accelerate corporate operations.

## Future Enhancements

- **Mobile App for Sales and Inventory Teams:** Give the Sales and Inventory teams mobile access to important data by using the Salesforce Mobile App. For instance, inventory employees may use the mobile app to update the Inventory\_\_c object while doing stock counts on the warehouse floor, while salespeople could check product availability and place orders while driving.
- **Inventory Forecasting:** Incorporate predictive inventory forecasting into the current Apex stock monitoring process. This would increase operational efficiency beyond basic low-stock alerts by projecting future demand using order history data (HandsMen Order\_\_c) and product details (HandsMen Product\_\_c). This would enable proactive purchasing and production decisions.
- **E-commerce Integration:** To allow real-time synchronization of product data (HandsMen Product\_\_c), inventory levels (Inventory\_\_c), and customer orders (HandsMen Order\_\_c), integrate the Salesforce solution with an e-commerce platform. This would simplify order capture, do away with human data entry, and provide clients the most recent stock availability.
- **Case Management for Defective Products and Returns:** Create a structured Case Management process, specifically for handling returns or product quality issues. This would utilize the existing HandsMen\_Order\_\_c and HandsMen\_Product\_\_c objects to log and track the resolution of defective or returned items.

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- 
- **Supplier Management:** Create a new custom object, to manage relationships with multiple suppliers and manufactures. This will allow for tracking of raw material costs, delivery schedules, and quality assurance records, integrating the supply chain directly into the Salesforce environment.

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