



HandsMen Threads:

Elevating the Art of Sophistication in Men's Fashion

A Salesforce Project Documentation Report of a Capstone Project for the
Salesforce Developer Virtual Internship Program

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Bachelor of Science in Information Technology 4-1

November 2025

Project Overview

HandsMen Threads is a growing brand in the fashion industry. They intend to launch a Salesforce project to transform how they manage data and connect with customers. This project focuses on creating a strong, well-structured data model that stores all essential business information and ensures a smooth, consistent flow of data across the company.

The goal of Handsmen Threads CRM project is to provide a functional and well-structured system that facilitates the company's primary business functions, covering marketing, sales, and inventory management. Custom objects for customers, orders, products, and stock levels are included, ensuring accurate and consistent storage of all crucial business data. The system's key features include scheduled flows that update customer loyalty based on total purchases, automatic email alerts for order confirmation and low-stock situations, and loyalty tier tracking. To maintain proper data access and improve internal coordination, the project also defines user roles, profiles, and permission sets for the Sales, Marketing, and Inventory teams.

Objectives

The primary objectives of the Handsmen Threads CRM project are to develop a centralized and reliable system for tracking customers, products, orders, and inventories, as well as to streamline each department's daily workflow. By designing the system, the goal is to:

1. Improve customer management by storing all relevant customer information in one location.
2. Streamline the sales process by organizing orders, pricing, and status updates clearly.
3. Maintain accurate product and inventory records to avoid supply shortages and overstocking.
4. Automate key processes such as order confirmations, low-stock alerts, and loyalty tier updates.
5. Strengthen data security and access control with defined roles, profiles, and permission sets.
6. Enable better reporting and decision-making through structured data and dashboards.
7. Increase overall operational efficiency by reducing manual work and system errors.

Phase 01: Requirement Analysis & Planning

A. Understanding Business Requirements

Based on the user scenario, HandsMen Threads required a solution that would:

- Centralize customer data for complete relationship management
- Automate order confirmations to enhance customer experience
- Implement dynamic loyalty programs based on purchase history
- Provide real-time inventory tracking with proactive alerts
- Enable bulk processing for nightly operational updates
- Maintain data integrity directly from the user interface

The scope of this project includes:

- Custom object development (Customers, Products, Orders, Inventory)
- Automated email communication system
- Loyalty program automation
- Real-time inventory management
- Role-based security model

However, it will not include the following:

- Third-party ERP integration
- Mobile application development
- AI and predictive analytics
- Supplier portal development

B. Design Data Model and Security Model

Data Model:

- **HandsMen Customers** (enhanced Account/Contact objects)
- **HandsMen Products** with pricing and categorization
- **HandsMen Orders** with status tracking and line items
- **Inventory** with stock levels and threshold management
- **Marketing Campaign** Object for customer engagement

Security Model:

- Platform 1 profile as baseline access
- Role hierarchy: Sales, Marketing, Inventory
- Permission sets for departmental access control
- Field-level security for sensitive data

C. Stakeholders Mapping

- **Sales Team:** Order management and customer relations
- **Inventory Team:** Stock monitoring and replenishment
- **Marketing Team:** Campaign management and loyalty programs
- **Management:** Reporting and business intelligence

D. Execution RoadMap (as shown in User Story > Project Overview)

Phase 1: Architecture & Planning

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.
- Design email templates for notifications and customer communication.

Phase 2: Development

- Object and field creation.
- Implement automation (flows, process builders, Apex triggers).
- Set up data security and sharing rules.
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

Phase 3: Testing & QA

- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

Phase 4: Deployment & Training

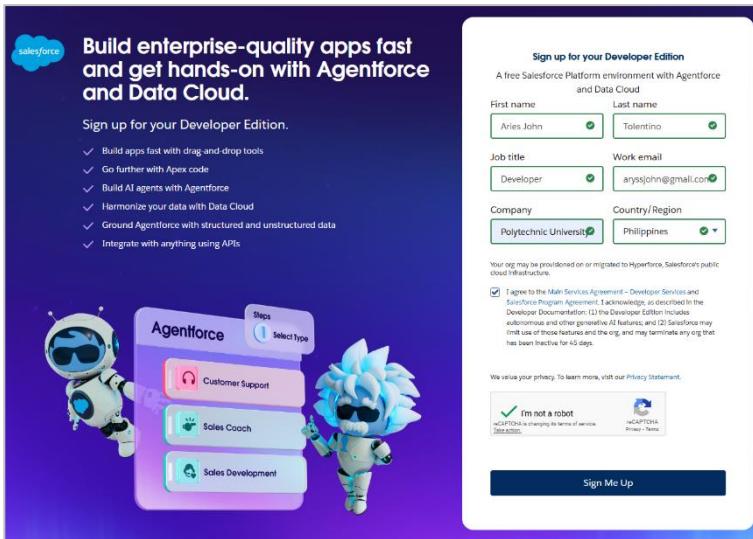
- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

Deliverable

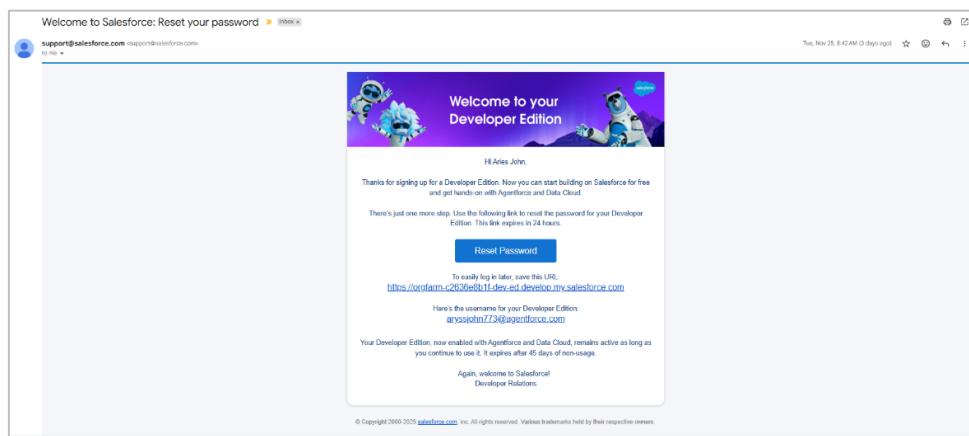
- Solution Design Document including Object Model, ERD, and Automation Strategy

Phase 02: Salesforce Development - Backend & Configurations

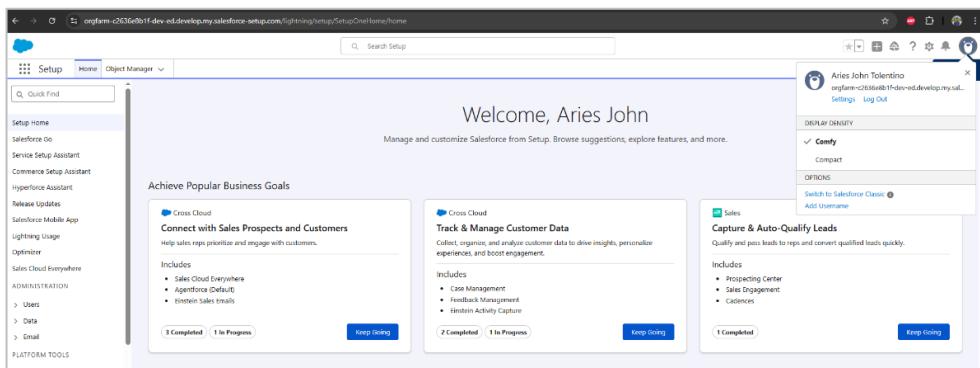
A. Setup environment & DevOps workflow



- Signing up for a Developer Edition account



- Once the reset password email has been received, I then changed my password.



- I then logged in to my developer edition account.

B. Customization of Objects & Fields

HandsMen Customer

SETUP > OBJECT MANAGER HandsMen Customer					
Details	Fields & Relationships 11 items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Email	Email__c	Email		
Buttons, Links, and Actions	FirstName	FirstName__c	Text(60)		
Compact Layouts	FullName	FullName__c	Formula (Text)		
Field Sets	HandsMen Customer Name	Name	Text(80)		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	LastName	LastName__c	Text(60)		
Related Lookup Filters	Loyalty Status	Loyalty_Status__c	Picklist		
Search Layouts	Owner	OwnerId	Lookup(User/Group)		
List View Button Layout	Phone	Phone__c	Phone		
Restriction Rules	Total Purchases	Total_Purchases__c	Number(18, 0)		
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

- This is set to store customer information.

HandsMen Product

SETUP > OBJECT MANAGER HandsMen Product					
Details	Fields & Relationships 7 items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	HandsMen Product Name	Name	Text(80)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User/Group)		
Field Sets	Price	Price__c	Currency(18, 0)		
Object Limits	SKU	SKU__c	Text(60)		
Record Types	Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Related Lookup Filters					
Search Layouts					

- Details of items sold by HandsMen Threads

HandsMen Order

SETUP > OBJECT MANAGER HandsMen Order					
Details	Fields & Relationships 10 items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Customer Email	Customer_Email__c	Email		
Buttons, Links, and Actions	HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		
Compact Layouts	HandsMen OrderNumber	Name	Auto Number		
Field Sets	HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Owner	OwnerId	Lookup(User/Group)		
Related Lookup Filters	Quantity	Quantity__c	Number(18, 0)		
Search Layouts	Status	Status__c	Picklist		
List View Button Layout	Total Amount	Total_Amount__c	Number(18, 0)		
Restriction Rules					
Scoping Rules					
Object Access					

- This tracks customer purchases and status of orders.

Inventory

Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Page Layouts	Created By	CreatedBy	Lookup(User)	
Lightning Record Pages	HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)	✓
Buttons, Links, and Actions	Inventory Number	Name	Auto Number	✓
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)	✓
Field Sets	Stock Quantity	Stock_Quantity__c	Number(18, 0)	✓
Object Limits	Stock Status	Stock_Status__c	Formula (Text)	✓
Record Types	Warehouse	Warehouse__c	Text(60)	✓
Related Lookup Filters				
Search Layouts				

- Monitors product stock levels and their respective availability.

Marketing Campaign

Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Page Layouts	Created By	CreatedBy	Lookup(User)	
Lightning Record Pages	End Date	End_Date__c	Date	✓
Buttons, Links, and Actions	HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	✓
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)	✓
Field Sets	Marketing Campaign Number	Name	Auto Number	✓
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓
Record Types	Start Date	Start_Date__c	Date	✓
Related Lookup Filters				
Search Layouts				

- Tracks promotional activities and customer engagement

C. Validation Rules

HandsMen Customer Validation Rule - Email

HandsMen Customer Validation Rule

[Back to HandsMen Customer](#)

Validation Rule Detail	
Rule Name	Email
Error Condition Formula	NOT CONTAINS(Email__c , "@gmail.com")
Error Message	Please fill Correct Gmail
Description	
Created By	Aries John Tolentino, 11/24/2025, 5:20 PM
Modified By	Aries John Tolentino, 11/24/2025, 5:20 PM
Edit Clone	

- Customer email format validation.

Error Message: "Please fill Correct Gmail"

Inventory Validation Rule – Stock_Quantity

Inventory Validation Rule

[Back to Inventory](#)

Validation Rule Detail	
Rule Name	Stock_Quantity
Error Condition Formula	Stock_Quantity__c <= 0
Error Message	the inventory count is never less than zero.
Description	
Created By	Aries John Tolentino, 11/24/2025, 5:19 PM
Modified By	Aries John Tolentino, 11/24/2025, 5:19 PM
Edit Clone	

- The inventory count can never be less than zero.

Error Message: "the inventory count is never less than zero."

HandsMen Order Validation Rule – Total_Amount

HandsMen Order Validation Rule

[Back to HandsMen Order](#)

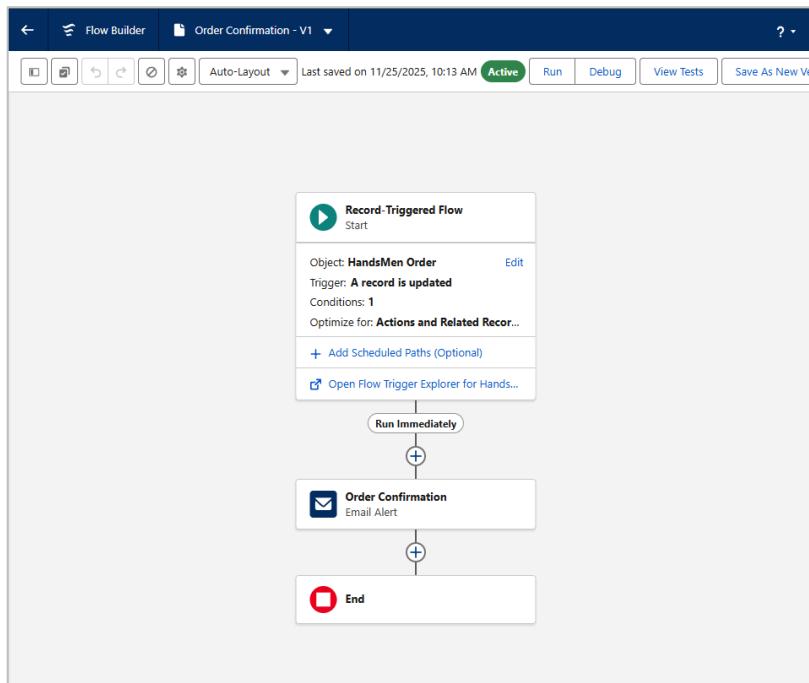
Validation Rule Detail	
Rule Name	Total_Amount
Error Condition Formula	Total_Amount__c <= 0
Error Message	Please Enter Correct Amount
Description	
Created By	Aries John Tolentino, 11/24/2025, 6:45 PM
Modified By	Aries John Tolentino, 11/24/2025, 6:45 PM
Edit Clone	

- Validation for Total Amount to make sure it's correct.

Error Message: "Please Enter Correct Amount"

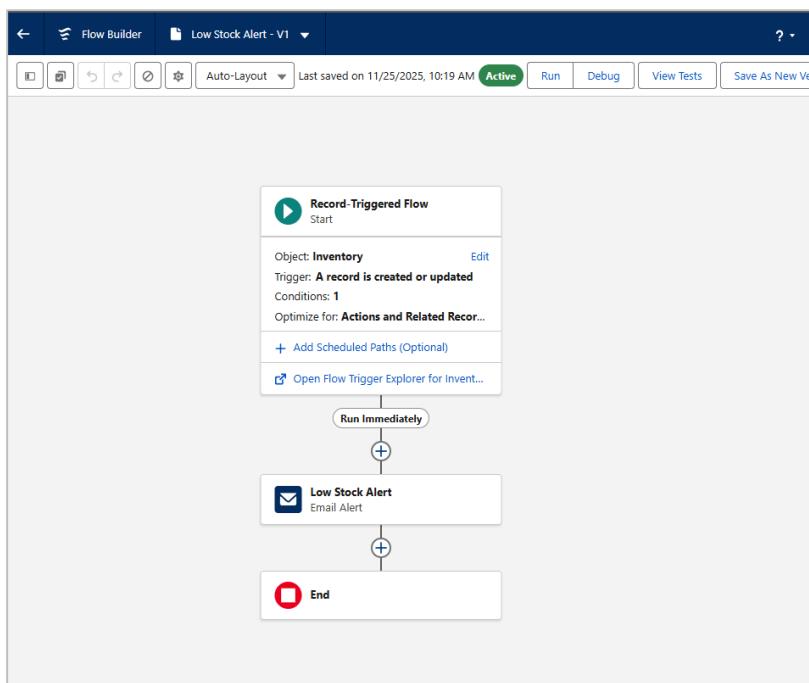
D. Automation

Order Confirmation Flow



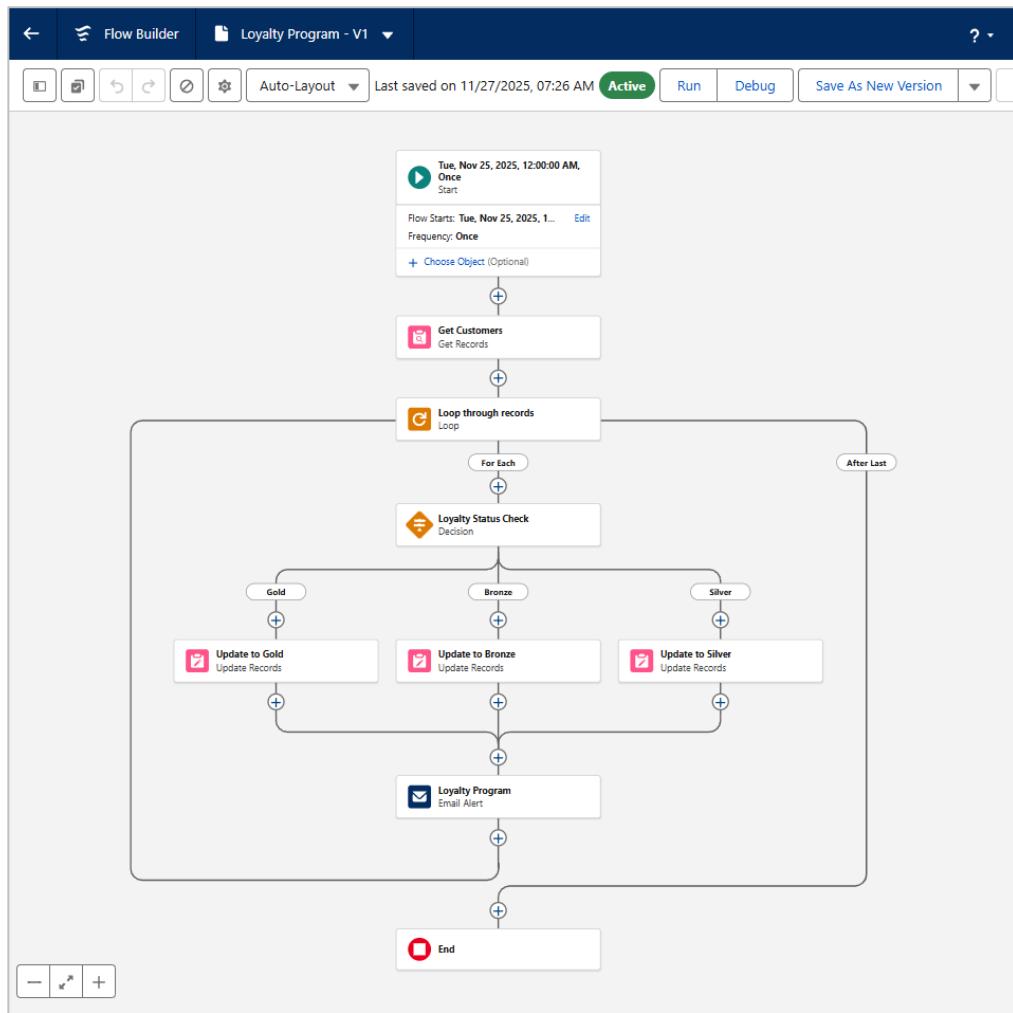
- This is the record-triggered flow for emailing customers that their order is confirmed

Low Stock Alert Flow



- This record-triggered flow alerts the team when there is a product low in stock (less than 5).

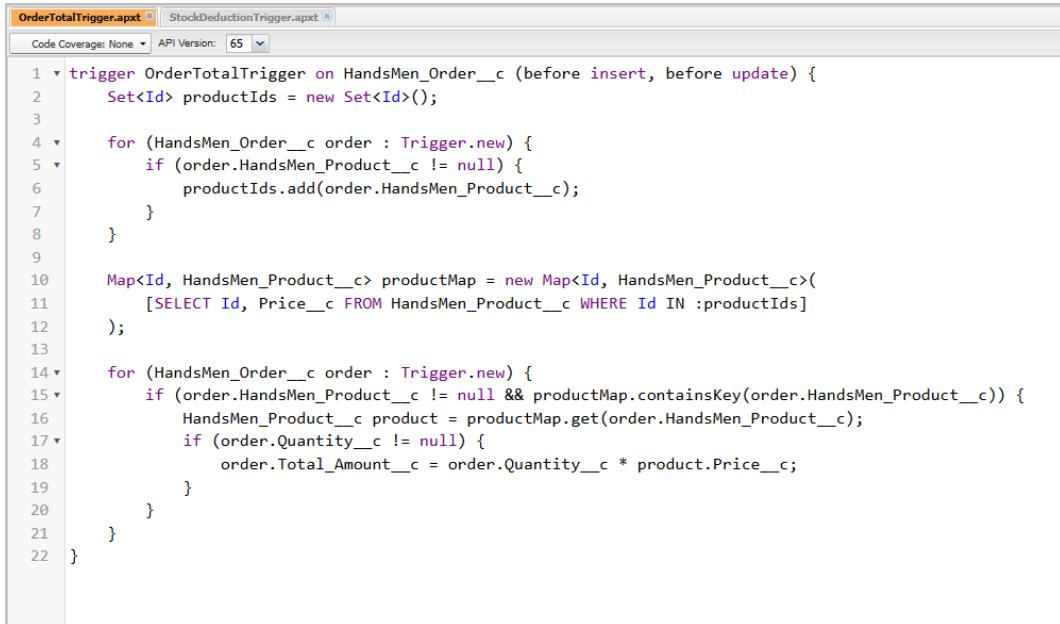
Loyalty Program Alert Flow



- This will trigger the 'Loyalty Program' Email Alert. Which sends a personalized congratulations email using the template I showed to you earlier.

E. Apex Triggers

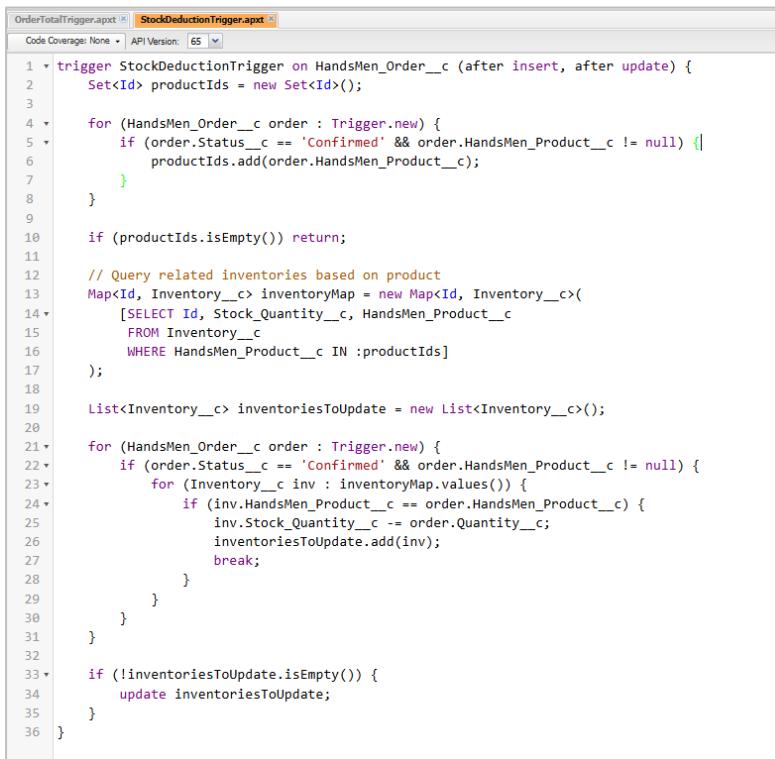
Order Total Trigger



```
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();
    ...
}
```

- Calculates the total before the order is saved

Stock Deduction Trigger



```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();
    ...
}

if (productIds.isEmpty()) return;

// Query related inventories based on product
Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
    [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
     FROM Inventory__c
     WHERE HandsMen_Product__c IN :productIds]
);
List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

for (HandsMen_Order__c order : Trigger.new) {
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
        productIds.add(order.HandsMen_Product__c);
    }
}

for (HandsMen_Order__c order : Trigger.new) {
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
        for (Inventory__c inv : inventoryMap.values()) {
            if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                inv.Stock_Quantity__c -= order.Quantity__c;
                inventoriesToUpdate.add(inv);
                break;
            }
        }
    }
}

if (!inventoriesToUpdate.isEmpty()) {
    update inventoriesToUpdate;
}
}
```

- Updates the inventory after the order is confirmed.

Phase 03: UI/UX Development & Customization

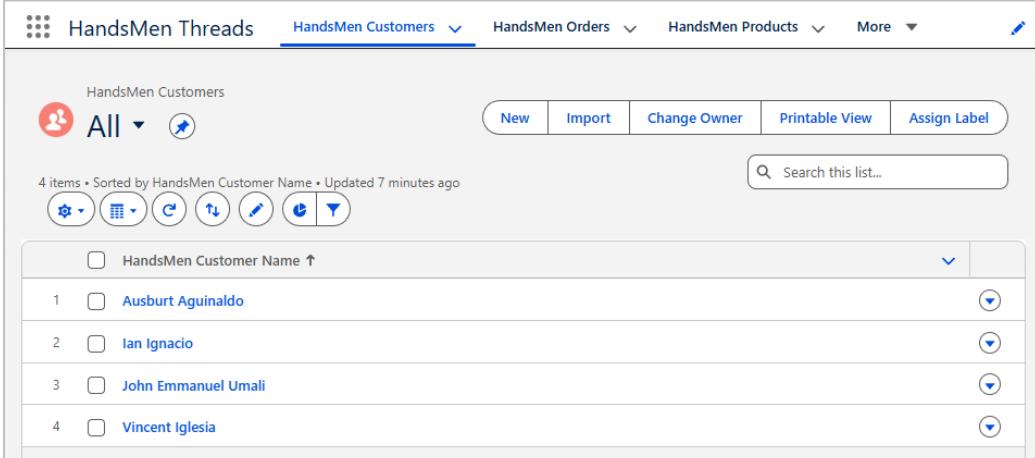
A. Lightning App Setup

The image shows two screenshots of the Salesforce Lightning Experience. The top screenshot displays the App Launcher with a search bar for 'Handsman' and a link to 'Visit AppExchange'. It lists 'All Apps' with one entry: 'HandsMen Threads' (HT icon), which has a placeholder 'Give a meaningful description'. Below this is a section for 'All Items' with three items: 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products'. The bottom screenshot shows a list view for 'HandsMen Customers' under the 'HandsMen Threads' tab. The navigation bar includes tabs for 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The list view shows 4 items, sorted by 'HandsMen Customer Name', updated 2 minutes ago. The items are: 1. Aubert Agualdo, 2. Ian Ignacio, 3. John Emmanuel Umali, and 4. Vincent Iglesia. Each item has a checkbox and a circular icon.

- This is the Lightning App for HandsMen Threads. It includes navigation tabs for the custom objects and other objects.

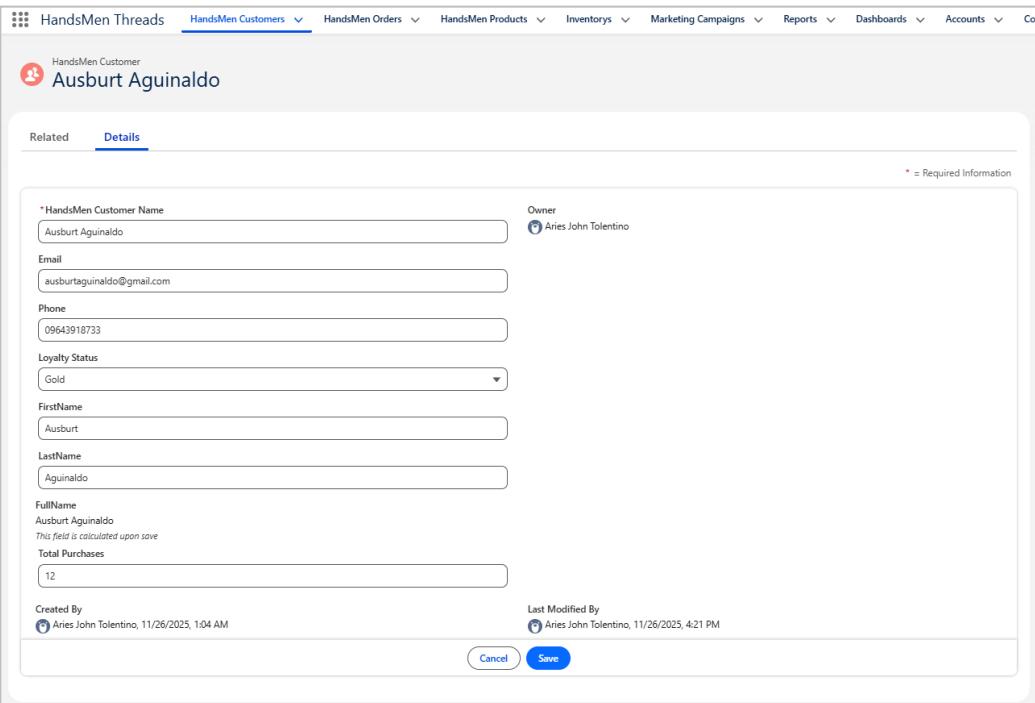
B. Page Layouts, Dynamic Forms, User Management, Reports, and Dashboards

Customers List – An overview of all HandsMen Customers.



The screenshot shows a list of four HandsMen Customers: Ausburt Aguinaldo, Ian Ignacio, John Emmanuel Umali, and Vincent Iglesia. The list is sorted by Customer Name. At the top, there are filters for 'All' customers, buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label', and a search bar. Below the list are icons for sorting, filtering, and other actions.

HandsMen Customer Details – This shows customer information.



The screenshot shows the detailed information for the customer 'Ausburt Aguinaldo'. The 'Details' tab is selected. The form includes fields for HandSMen Customer Name (Ausburt Aguinaldo), Email (ausburtaguinaldo@gmail.com), Phone (09643918733), Loyalty Status (Gold), FirstName (Ausburt), LastName (Aguinaldo), and FullName (Ausburt Aguinaldo). It also shows the owner (Aries John Tolentino) and modification history. A note indicates that the FullName field is calculated upon save. The bottom of the form has 'Cancel' and 'Save' buttons.

Orders List – An overview of HandsMen Orders

The screenshot shows the HandsMen Orders list page. At the top, there are navigation links: HandsMen Threads, HandsMen Customers, HandsMen Orders (which is underlined in blue), HandsMen Products, More, and a pen icon. Below the header, there's a search bar with a magnifying glass icon and the placeholder "Search this list...". A toolbar with buttons for New, Import, Change Owner, Printable View, and Assign Label is also present. The main area displays a table with the following data:

	HandsMen OrderNumber	Status	Action
1	O-0001	Open	
2	O-0002	Open	
3	O-0003	Open	
4	O-0005	Open	

Order Details – Information of each order is shown here

The screenshot shows the HandsMen Order details page for Order Number O-0001. The top navigation bar includes HandsMen Threads, HandsMen Customers, HandsMen Orders (underlined in blue), HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and a Co-link. The main content area has tabs for Related and Details, with the Details tab selected. The form fields include:

- HandsMen OrderNumber: O-0001
- Owner: Aries John Tolentino
- HandsMen Product: Oversized T-Shirt
- HandsMen Customer: Ausburt Aguinaldo
- Customer Email: arysjohn@gmail.com
- Status: Confirmed
- Quantity: 1
- Total Amount: 50
- Created By: Aries John Tolentino, 11/24/2025, 6:14 PM
- Last Modified By: Aries John Tolentino, 11/26/2025, 1:06 AM

At the bottom right are Cancel and Save buttons.

Product List - An overview of all HandsMen Thread's Products

The screenshot shows the HandsMen Products list page. At the top, there are navigation links: HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products (underlined in blue), More, and a pen icon. Below the header, there's a search bar with a magnifying glass icon and the placeholder "Search this list...". A toolbar with buttons for New, Import, Change Owner, Printable View, and Assign Label is also present. The main area displays a table with the following data:

	HandsMen Product Name	Status	Action
1	Blue Jeans	Open	
2	Corduroy Pants	Open	
3	Drifit Hoodie	Open	
4	Oversized T-Shirt	Open	

Product Details – View of more details of each product

The screenshot shows the 'HandsMen Products' section of the application. The product name is 'Oversized T-Shirt'. The 'Details' tab is selected. The form includes fields for Product Name (Oversized T-Shirt), SKU (011), Price (\$50), Stock Quantity (210), Owner (Aries John Tolentino), and Last Modified By (Aries John Tolentino). Buttons for 'Cancel' and 'Save' are at the bottom.

Inventory List – An overview of HandsMen Thread's Inventory

The screenshot shows the 'Inventory' section of the application. It lists four items: I-0005, I-0006, I-0007, and I-0008. The table has columns for Inventory Number, Status, and Actions. A search bar and various management buttons like New, Import, and Assign Label are visible at the top.

Inventory Details – Details for each inventory item to manage them.

The screenshot shows the 'Inventory' section of the application for item 'I-0005'. The 'Details' tab is selected. The form includes fields for Inventory Number (I-0005), Stock Quantity (32), Stock Status (Available), Warehouse (Pandi, Bulacan), and Last Modified By (Aries John Tolentino). Buttons for 'Cancel' and 'Save' are at the bottom.

Marketing Campaigns

The screenshot shows the Marketing Campaigns page. At the top, there's a navigation bar with links for HandsMen Threads, Customers, Orders, Products, Inventories, Marketing Campaigns (which is highlighted in blue), Reports, Dashboards, Accounts, and Contacts. Below the navigation is a search bar with the placeholder "Search this list..." and several filter and sort icons. A large, light-blue decorative illustration of a landscape with mountains, clouds, and a small building is centered on the page. Below the illustration, a message says "Nothing to see here" and "There's nothing in your list yet. Try adding a new record."

Reports

The screenshot shows the Reports page. The left sidebar has sections for REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main area features a light-blue decorative illustration of a desert landscape with a cactus and a sun. Below the illustration, a message says "Recent reports appear here" and "Go to All Reports to see what's available." with a "View All Reports" link.

Dashboards

The screenshot shows the Dashboards page. The left sidebar has sections for DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main area features a light-blue decorative illustration of a desert landscape with a cactus and a sun. Below the illustration, a message says "Recent dashboards appear here" and "Go to All Dashboards to see what's available." with a "View All Dashboards" link.

Accounts

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventory Marketing Campaigns Reports Dashboards Accounts Contacts

All Accounts

13 items • Sorted by Account Name • Updated a few seconds ago

	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America		North Carolina	(386) 222-7000	Customer - Direct	OPIC
2	Dickenson plc		Kansas	(785) 241-4200	Customer - Channel	OPIC
3	Edge Communications		Texas	(913) 757-6000	Customer - Direct	OPIC
4	Express Logistics and Transport		Oregon	(503) 421-7000	Customer - Channel	OPIC
5	GenPoint		California	(855) 887-3450	Customer - Channel	OPIC
6	Grand Hotels & Resorts Ltd		Illinois	(713) 596-1000	Customer - Direct	OPIC
7	Pyramid Construction Inc.			(814) 427-4427	Customer - Channel	OPIC
8	Sample Account for Entitlements					autoPMK
9	aforce		California	(415) 901-7000	Customer - Direct	OPIC
10	United Oil & Gas Corp		New York	(212) 642-5500	Customer - Direct	OPIC
11	United Oil & Gas, Singapore			(850) 450-8810	Customer - Direct	OPIC
12	United Oil & Gas, UK			+44 191 4956201	Customer - Direct	OPIC
13	University of Arizona		Arizona	(520) 773-9000	Customer - Direct	OPIC

Contacts

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventory Marketing Campaigns Reports Dashboards Accounts Contacts

My Contacts

Total Contacts: 0 No Activity: 0 Idle: 0 No Upcoming: 0 Overdue: 0 Due Today: 0 Upcoming: 0

0 items • Filtered by Created Date, Me, Total Contacts

Get your contacts engaged!

When there are contacts that match your selections, you'll see them here.

User Management

SETUP Users

All Users

On this page you can create, view, and manage users. To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | [Edit | Create New View](#)

New User | Reset Passwords | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Chatter Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com	Marketing	<input checked="" type="checkbox"/>	Chatter Expert User
<input type="checkbox"/>	Edit OPIC_0raFarm	OPIC	opic.5e9319b0d08c@opiconf.salesforce.com	Inventory	<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	Edit Miraeon_Jan	mirka	aryashohn75@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform_1
<input checked="" type="checkbox"/>	Edit Miraeon_Kol	mirka	aryashohn55@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform_1
<input checked="" type="checkbox"/>	Edit Miraeon_Nikus	mirka	aryashohn72@gmail.com	Sales	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit Tolentino_Aries John	ax	aryashohn73@ayyforce.com	Analytics	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Integration	intey	inteyonation00000000000000000000000000000000@zruth.com	Analytics	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity00000000000000000000000000000000@zruth.com	Analytics	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Phase 04: Data Migration, Testing & Security

A. Profiles

Profile Detail

Name	Platform 1
User License	Salesforce
Description	
Created By	Aries John Tolentino, 11/24/2025, 5:25 PM
Modified By	Aries John Tolentino, 11/24/2025, 6:43 PM

Users Assigned to Profile

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Mikaelson, Jan	jmika	arcsjohn05@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson, Kol	kmika	arcsjohn456@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson, Niklaus	nmika	arcsjohn123@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1

B. Roles and Role Hierarchy

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

- College of Exact JM
 - Add Role
 - CEO [Edit](#) [Del](#) [Assign](#)
 - Add Role
 - CEO [Edit](#) [Del](#) [Assign](#)
 - Add Role
 - COO [Edit](#) [Del](#) [Assign](#)
 - Add Role
 - Inventory [Edit](#) [Del](#) [Assign](#)
 - Add Role
 - Marketing [Edit](#) [Del](#) [Assign](#)
 - Add Role
 - Sales [Edit](#) [Del](#) [Assign](#)
 - Add Role

Inventory Role – Kol Mikaelson

Role Detail

Label	Inventory	Role Name as displayed on reports	Sharing Groups	Role, Rule and Internal Subordinates
This role reports to	CEO			
Modified By	Aries John Tolentino, 11/24/2025, 5:27 PM			
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities			
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases			

Users in Inventory Role

Action	Full Name	Alias	Username	Active
Edit	Kol Mikaelson	kmika	arcsjohn456@gmail.com	<input type="checkbox"/>

Sales Role – Niklaus Mikaelson

Role Sales

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Polytechnic University of the Philippines Santa Maria Bulacan Campus > CEO > Sales
Siblings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO_Inventory, Marketing

[Users in Sales Role](#)

Role Detail		
Label	Sales	Role Name as displayed on reports
This role reports to	CEO	Role Name
Modified By	Ares John Tolentino, 11/24/2025, 5:27 PM	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

[Assign Users to Role](#) [New User](#)

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	aresjohn123@mail.com	✓

[Users in Sales Role Help](#)

Marketing Role – Ian Mikaelson

Role Marketing

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Polytechnic University of the Philippines Santa Maria Bulacan Campus > CEO > Marketing
Siblings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO_Sales, Inventory

[Users in Marketing Role](#)

Role Detail		
Label	Marketing	Role Name as displayed on reports
This role reports to	CEO	Role Name
Modified By	Ares John Tolentino, 11/24/2025, 5:27 PM	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

[Assign Users to Role](#) [New User](#)

Action	Full Name	Alias	Username	Active
Edit	Ian Mikaelson	imika	aresjohn098@gmail.com	✓

[Users in Marketing Role Help](#)

C. Permission sets

Sales Permission Set - HandsMen Customers

Sales Permission Set

[Find Settings...](#) | [Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

Permission Set Overview > Object Settings [HandsMen Customers](#)

HandsMen Customers [Edit](#)

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> i

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Sales Permission Set - HandsMen Orders

Permission Set
Sales Permission Set

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **HandsMen Orders** ▾

HandsMen Orders Edit

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Inventory Permission Set – HandsMen Products

Permission Set
Inventory Permission Set

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **HandsMen Products** ▾

HandsMen Products Edit

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Inventory Permission Set – Inventorys

Permission Set
Inventory Permission Set

Permission Set Overview > Object Settings ▾ **Inventorys** ▾

Inventorys

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Marketing Permission Set - HandsMen Customers

Permission Set
Marketing Permission Set

Permission Set Overview > Object Settings ▾ **HandsMen Customers** ▾

HandsMen Customers

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Marketing Permission Set – Marketing Campaigns

The screenshot shows the 'Marketing Permission Set' configuration page. At the top, there's a navigation bar with 'Find Settings...', 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below the navigation is a breadcrumb trail: 'Permission Set Overview' > 'Object Settings' > 'Marketing Campaigns'. The main section is titled 'Marketing Campaigns' with an 'Edit' button. Under 'Tab Settings', there's a table with two columns: 'Available' and 'Visible'. The 'Visible' column has one row with a checkbox and an info icon. In the 'Object Permissions' section, there's a table with columns 'Permission Name' and 'Enabled'. The permissions listed are Read, Create, Edit, Delete, View All Records, Modify All Records, and View All Fields. The 'Edit' and 'Delete' permissions are checked.

D. Creation of Apex Triggers and Classes

Order Total Trigger

The screenshot shows the code editor for the 'OrderTotalTrigger.apxt' trigger. The code is written in Apex and defines a trigger that runs before insert or update on the 'HandsMen_Order__c' object. It uses a set of product IDs and a map to calculate the total amount for each order based on the quantity and price of its products.

```
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();
    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}
```

Stock Deduction Trigger

The screenshot shows the Salesforce code editor with the tab 'StockDeductionTrigger.apxc' selected. The code implements a trigger on the HandsMen_Order__c object. It first creates a set of product IDs. Then, it loops through each order. If the order's status is 'Confirmed' and its HandsMen_Product__c is not null, it adds the product ID to the set. After the loop, if the set is empty, it returns. Otherwise, it queries related inventories based on the product IDs. It then loops through each order again. For each order, it checks if its status is 'Confirmed' and its HandsMen_Product__c is not null. If so, it iterates through the inventories. If the inventory's HandsMen_Product__c matches the order's HandsMen_Product__c, it decrements the inventory's Stock_Quantity__c by the order's Quantity__c. Finally, it updates the inventories.

```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    if (productIds.isEmpty()) return;
    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
         FROM Inventory__c
         WHERE HandsMen_Product__c IN :productIds]
    );
    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
                    break;
                }
            }
        }
    }
    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

Order Trigger Handler

The screenshot shows the Salesforce code editor with the tab 'OrderTriggerHandler.apxc' selected. The code defines a public class OrderTriggerHandler with a static method validateOrderQuantity. This method takes a list of HandsMen_Order__c objects. It loops through each order. For 'Confirmed' status, if the quantity is null or less than or equal to 500, it adds an error message. For 'Pending' status, if the quantity is null or less than or equal to 200, it adds an error message. For 'Rejection' status, if the quantity is null or not zero, it adds an error message. Finally, it prints a success message.

```
public class OrderTriggerHandler {
    public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
        for (HandsMen_Order__c order : orderList) {
            if (order.Status__c == 'Confirmed') {
                if (order.Quantity__c == null || order.Quantity__c <= 500) {
                    order.Quantity__caddError('For Status "Confirmed", Quantity must be more than 500.');
                }
            } else if (order.Status__c == 'Pending') {
                if (order.Quantity__c == null || order.Quantity__c <= 200) {
                    order.Quantity__caddError('For Status "Pending", Quantity must be more than 200.');
                }
            } else if (order.Status__c == 'Rejection') {
                if (order.Quantity__c == null || order.Quantity__c != 0) {
                    order.Quantity__caddError('For Status "Rejection", Quantity must be 0.');
                }
            }
        }
        System.debug('All records validated successfully.');
    }
}
```

Order Trigger

The screenshot shows the Salesforce code editor with the tab 'OrderTrigger.apxt' selected. The code defines a trigger OrderTrigger on the HandsMen_Order__c object. It triggers before insert or update. If the trigger is before and either insert or update, it calls the validateOrderQuantity method from the OrderTriggerHandler class.

```
trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
        OrderTriggerHandler.validateOrderQuantity(Trigger.new);
    }
}
```

E. Testing

Creating a customer

Input

New HandsMen Customer

* = Required Information

Information	
* HandsMen Customer Name	Aries John Tolentino
Email	aryssjohn@gmail.com
Phone	09543168611
Loyalty Status	Silver
FirstName	Aries John
LastName	Tolentino
Total Purchases	36

[Cancel](#) [Save & New](#) [Save](#)

Output

HandsMen Customer
Aries John Tolentino

[Related](#) [Details](#)

HandsMen Customer Name	Aries John Tolentino	Owner	Aries John Tolentino
Email	aryssjohn@gmail.com		
Phone	09543168611		
Loyalty Status	Silver		
FirstName	Aries John		
LastName	Tolentino		
FullName	Aries John Tolentino		
Total Purchases	36		
Created By	Aries John Tolentino, 11/27/2025, 5:34 PM	Last Modified By	Aries John Tolentino, 11/27/2025, 5:34 PM

HandsMen Customer "Aries John Tolentino" was created.

Creating an order

Input

New HandsMen Order

* = Required Information

Information	
HandsMen OrderNumber	Owner Aries John Tolentino
HandsMen Product <input type="text" value="Blue Jeans"/>	
HandsMen Customer <input type="text" value="Aries John Tolentino"/>	
*Customer Email <input type="text" value="aryssjohn@gmail.com"/>	
Status <input type="text" value="Pending"/>	
Quantity <input type="text" value="2"/>	
Total Amount <input type="text" value="120"/>	

Output

HandsMen Order O-0006

HandsMen Order "O-0006" was created. ×

Related	Details
HandsMen OrderNumber O-0006	Owner Aries John Tolentino
HandsMen Product Blue Jeans	
HandsMen Customer Aries John Tolentino	
Customer Email aryssjohn@gmail.com	
Status Pending	
Quantity 2	
Total Amount 160	
Created By Aries John Tolentino , 11/27/2025, 5:37 PM	Last Modified By Aries John Tolentino , 11/27/2025, 5:37 PM

Creating a new product

Input

New HandsMen Product

* = Required Information

Information	
* HandsMen Product Name	Satin Necktie
SKU	016
Price	\$15
Stock Quantity	250
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Output

HandsMen Product
Satin Necktie

[Related](#) [Details](#)

HandsMen Product Name Satin Necktie	Owner Aries John Tolentino
SKU 016	
Price \$15	
Stock Quantity 250	
Created By Aries John Tolentino , 11/27/2025, 5:40 PM	Last Modified By Aries John Tolentino , 11/27/2025, 5:40 PM

✓ HandsMen Product "Satin Necktie" was created. [X](#)

Creating an inventory item

Input

New Inventory

* = Required Information

Information

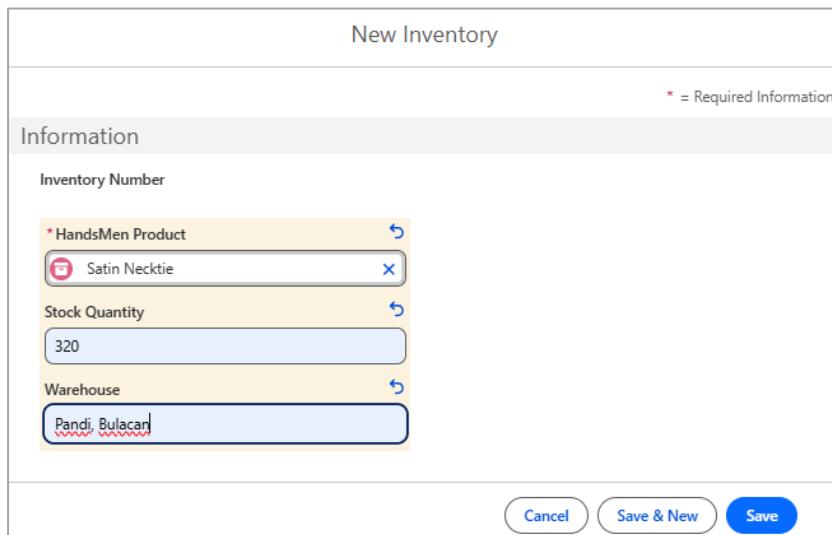
Inventory Number

* HandsMen Product
Satin Necktie

Stock Quantity
320

Warehouse
Pandi, Bulacan

[Cancel](#) [Save & New](#) [Save](#)



Output

Inventory I -0009

Details

Inventory Number
I -0009

HandsMen Product
[Satin Necktie](#)

Stock Quantity
320

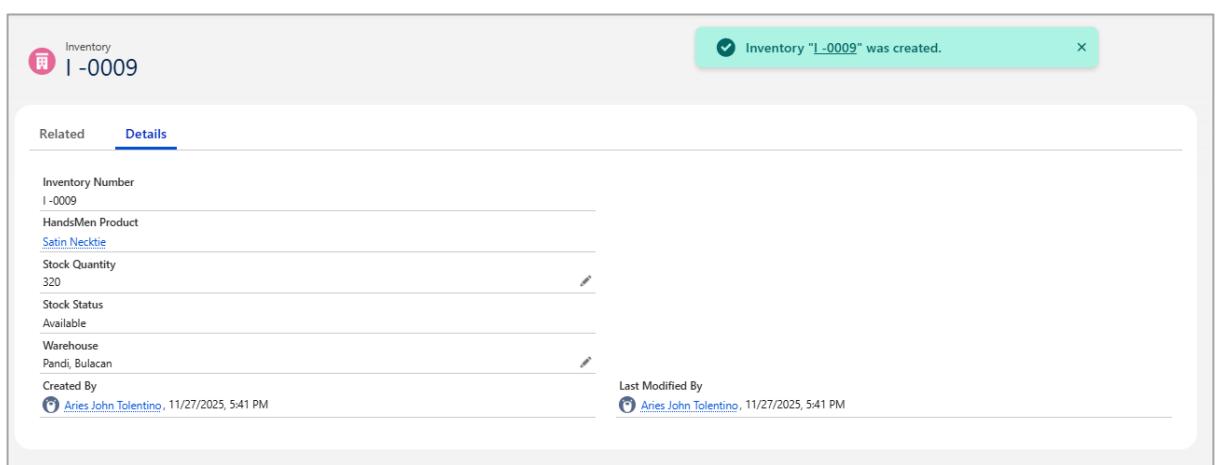
Stock Status
Available

Warehouse
Pandi, Bulacan

Created By
 [Aries John Tolentino](#), 11/27/2025, 5:41 PM

Last Modified By
 [Aries John Tolentino](#), 11/27/2025, 5:41 PM

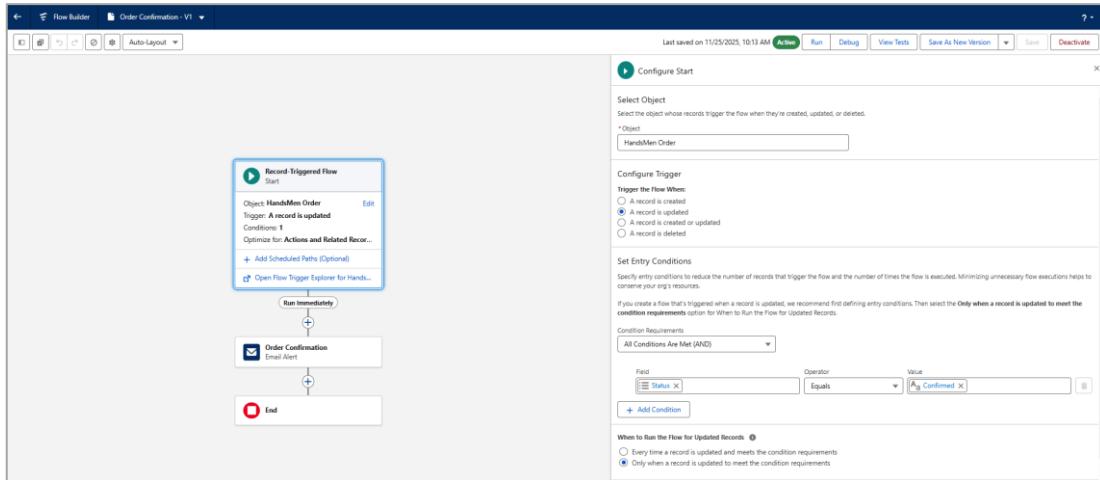




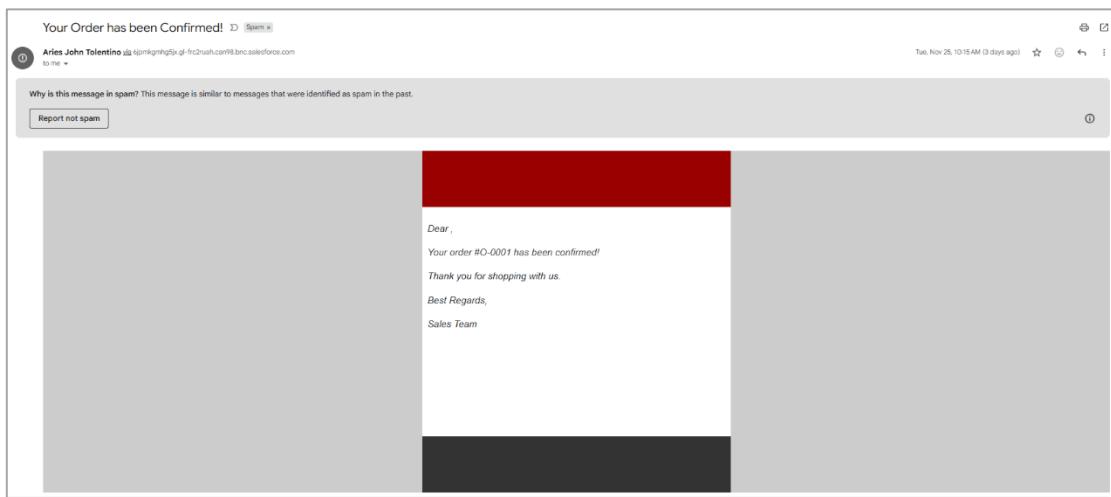
F. Testing Record Triggered Flow (Email Alerts)

Order Confirmation

Input

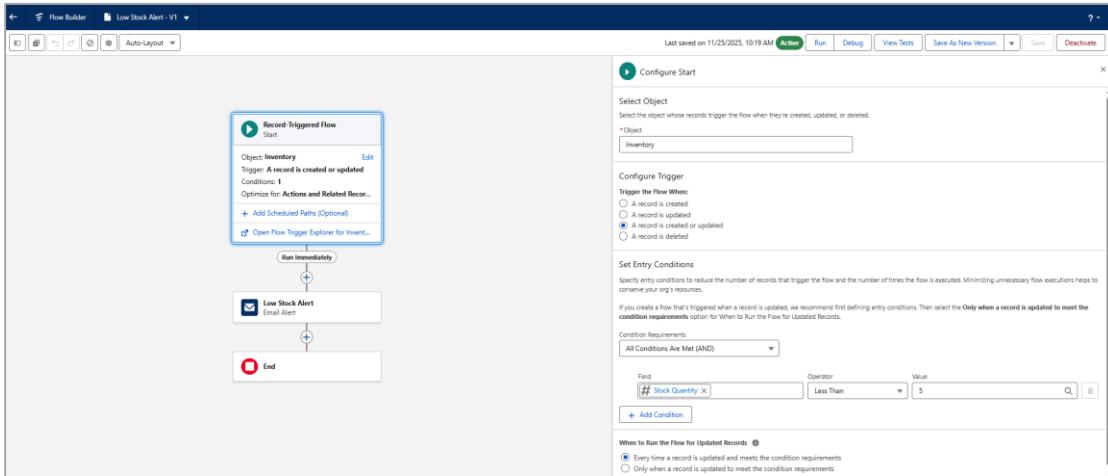


Output



Low Stock Alert Email

Input

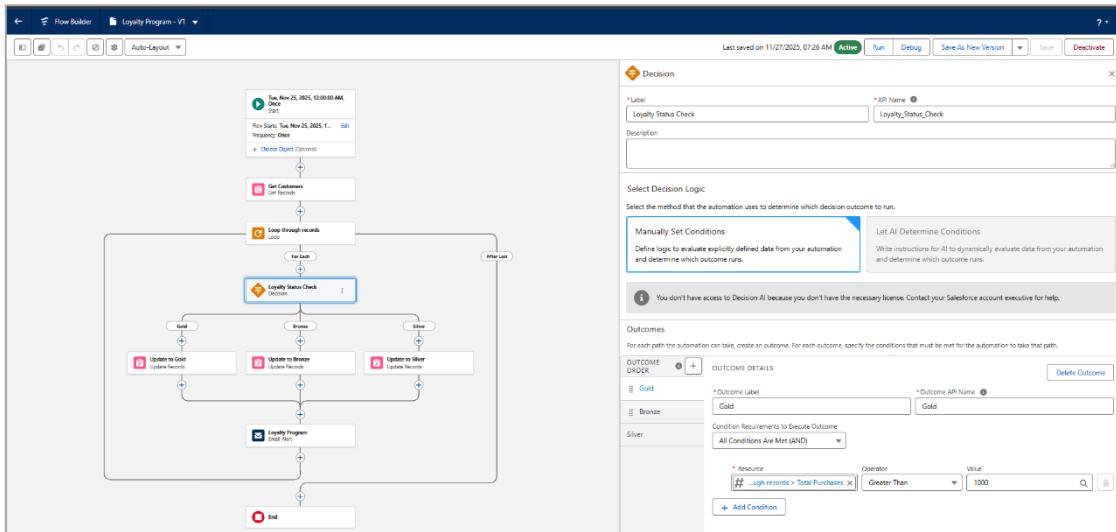


Output



Loyalty Program Email

Input



Output

The screenshot shows a Salesforce customer record for Ian Ignacio:

- HandsMen Customer Name:** Ian Ignacio
- Email:** arissjohn@gmail.com
- Phone:** 09543168611
- Loyalty Status:** Gold
- FirstName:** Ian
- LastName:** Ignacio
- FullName:** Ian Ignacio
- Total Purchases:** 1,500
- Created By:** Aries John Tolentino, 11/26/2025, 1:10 AM
- Last Modified By:** OrgFarm EPIC, 11/27/2025, 6:03 PM

Phase 05: Deployment, Documentation & Maintenance

A. Deployment Strategy

The deployment of the Handsmen Threads CRM solution follows a structured and controlled approach to ensure that all changes move safely from the development environment into production. The primary deployment method used is Salesforce Change Sets, which allow the transfer of custom objects, fields, flows, permission sets, email templates, and Apex triggers with clear traceability. This strategy ensures that every component can be validated, tested, and reviewed before being activated in the live environment.

B. System Maintenance & Monitoring

Once deployed, the system will be maintained through regular monitoring of key automation flows, validation rules, user permissions, and Apex trigger performance. Administrators will routinely review system logs, error emails, and queue backlogs to ensure that processes are running as expected. Maintenance also includes updating workflow logic when business requirements change, monitoring inventory thresholds, ensuring email alerts remain relevant, and reviewing data quality across all objects.

C. Documentation

Documentation includes only essential details needed to understand and maintain the system—not step-by-step instructions.

It covers:

- Brief descriptions of custom objects, fields, and their business purpose
- Overviews of validation rules, flows of key processes, and automation flows
- Explanations of Apex classes and triggers
- Screen captures of Salesforce setup pages:
 - a) Object Manager configurations
 - b) Permission sets and profiles
 - c) Role hierarchy
 - d) Flow diagrams
 - e) Email template configurations
 - f) Reports & dashboards settings

Testing Approach

- Functional testing for flows by creating sample records and checking correct updates and email alerts.
- Scenario-based testing for orders, inventory deductions, and loyalty updates.

- Access testing using different profiles and permission sets to verify correct visibility and edit rights.
- Report and dashboard testing to confirm data accuracy.

Future Enhancements

- AI-powered product recommendations or customer insights
- Chatbot integration for customer support
- Predictive inventory management
- Automated marketing using Salesforce Marketing Cloud or Einstein GPT
- Mobile app integration for faster on-the-go updates

Suggestions for Future Improvements

- AI-powered product recommendations or customer insights
- Chatbot integration for customer support
- Predictive inventory management
- Automated marketing journeys using Salesforce Marketing Cloud or Einstein
- Mobile app integration for faster on-the-go updates

Conclusion

In summary, the Handsmen Threads CRM is a comprehensive, well-organized solution that improves all aspects of the company, including internal operations, product management, and customer engagement. This system addresses the current needs of Handsmen Threads, the CRM is built with scalability in mind, ensuring that the system can grow alongside the business as demand, products, and processes expand.

By centralizing data and simplifying workflows, the business benefits from:

- More accurate customer information and loyalty tracking
- Streamlined sales and order processing
- Better visibility into product availability and stock levels
- Reduced manual effort through automated flows and Apex triggers
- Stronger data security through defined roles, profiles, and permission sets
- Consistent communication through automated email templates
- Improved reporting for decision-making and performance monitoring

The project demonstrates how structured planning, organized data modeling, proper documentation, and systematic testing can lead to a reliable CRM solution that supports both current needs and future growth.