



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

Submitted by:

Aries John D. Tolentino

Polytechnic University of the Philippines – Santa Maria, Bulacan Campus

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

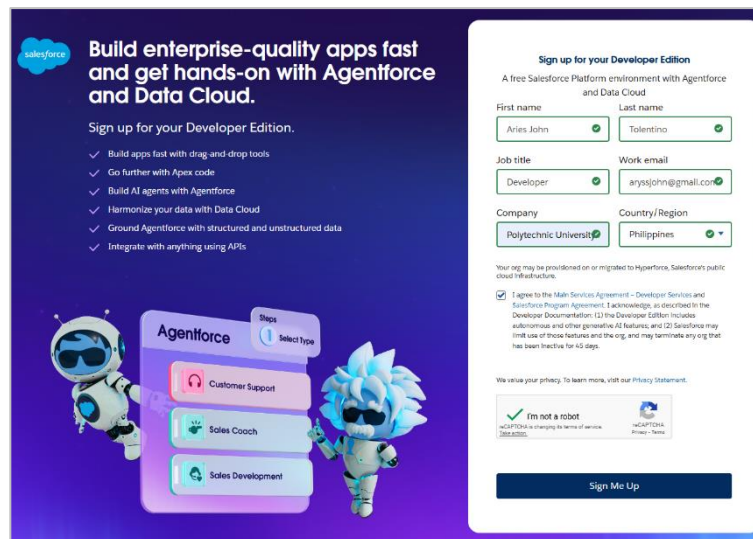
- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

Deliverable

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

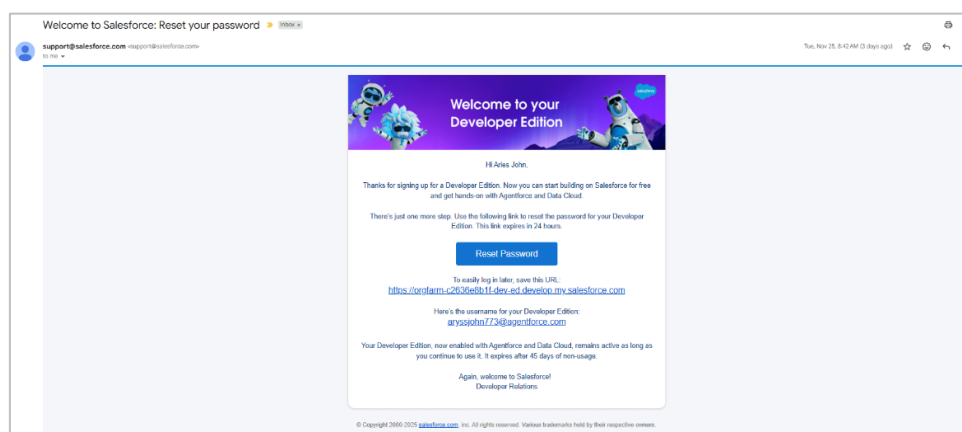
Phase 02: Salesforce Development - Backend & Configurations

A. Setup environment & DevOps workflow

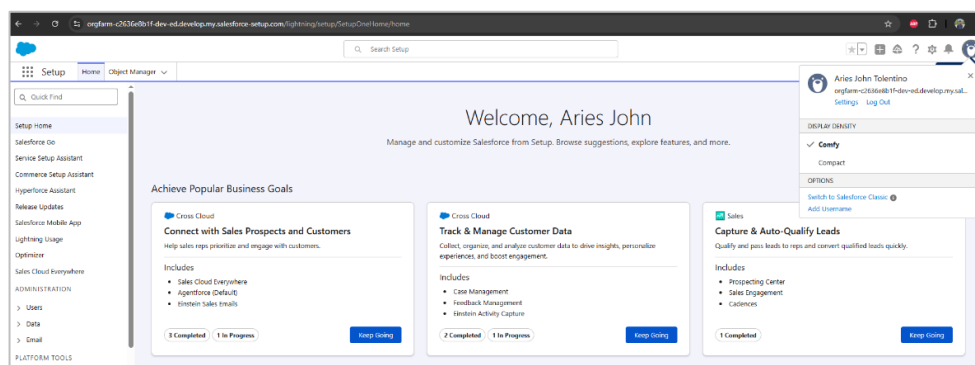


The image shows the Salesforce Developer Edition sign-up page. On the left, there's a purple banner with the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI Agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". In the center, there's a graphic of two Agentforce characters. On the right, there's a white form titled "Sign up for your Developer Edition". The form includes fields for "First name" (Aries John), "Last name" (Tolentino), "Job title" (Developer), "Work email" (arysajohn@gmail.com), "Company" (Polytechnic University), and "Country/Region" (Philippines). Below these fields, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a "Sign Me Up" button.

- 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				
Fields & Relationships	<div>Q, Quick Find</div> <div>New Deleted Fields Field Dependencies Set History Tracking</div>				
	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				
Fields & Relationships	<div>Q, Quick Find</div> <div>New Deleted Fields Field Dependencies Set History Tracking</div>				
	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				
Fields & Relationships	<div>Q, Quick Find</div> <div>New Deleted Fields Field Dependencies Set History Tracking</div>				
	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

SETUP > OBJECT MANAGER

Inventory

Details

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(60)		

- Monitors product stock levels and their respective availability.

Marketing Campaign

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User/Group)		✓
Start Date	Start_Date__c	Date		

- 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

EditClone

Rule Name	Email	Active	✓
Error Condition Formula	NOT CONTAINS(Email__c , "@"gmail.com")		
Error Message	Please fill Correct Gmail	Error Location	Top of Page
Description			
Created By	Aries John Tolentino, 11/24/2025, 5:20 PM	Modified By	Aries John Tolentino, 11/24/2025, 5:20 PM

EditClone

- Customer email format validation.

Error Message: "Please fill Correct Gmail"

Inventory Validation Rule – Stock_Quantity

Inventory Validation Rule

[Back to Inventory](#)

Validation Rule Detail

EditClone

Rule Name	Stock_Quantity	Active	✓
Error Condition Formula	Stock_Quantity__c <= 0		
Error Message	the inventory count is never less than zero.	Error Location	Top of Page
Description			
Created By	Aries John Tolentino, 11/24/2025, 5:19 PM	Modified By	Aries John Tolentino, 11/24/2025, 5:19 PM

EditClone

- 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

EditClone

Rule Name	Total_Amount	Active	✓
Error Condition Formula	Total_Amount__c <= 0		
Error Message	Please Enter Correct Amount	Error Location	Total Amount
Description			
Created By	Aries John Tolentino, 11/24/2025, 6:45 PM	Modified By	Aries John Tolentino, 11/24/2025, 6:45 PM

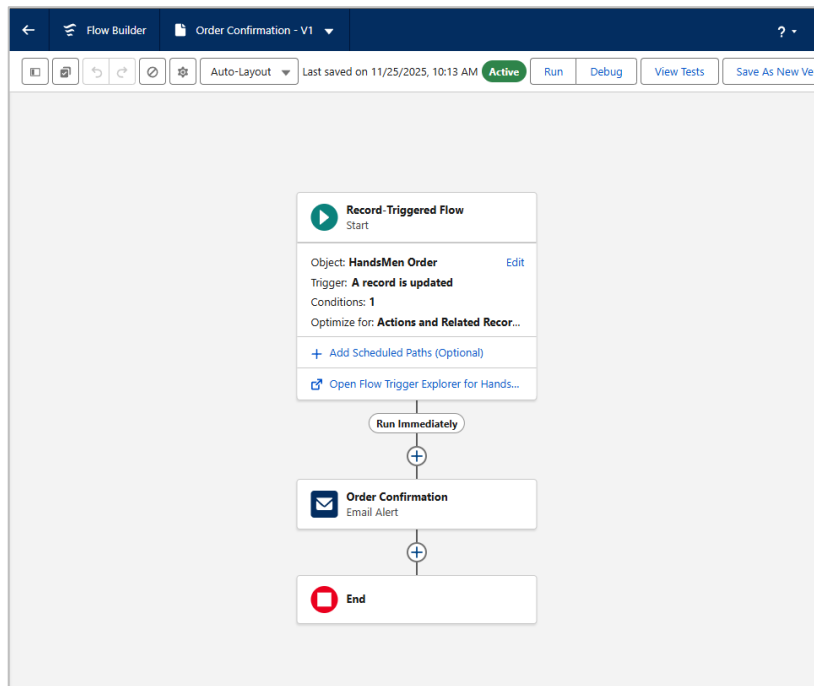
EditClone

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

Error Message: "Please Enter Correct Amount"

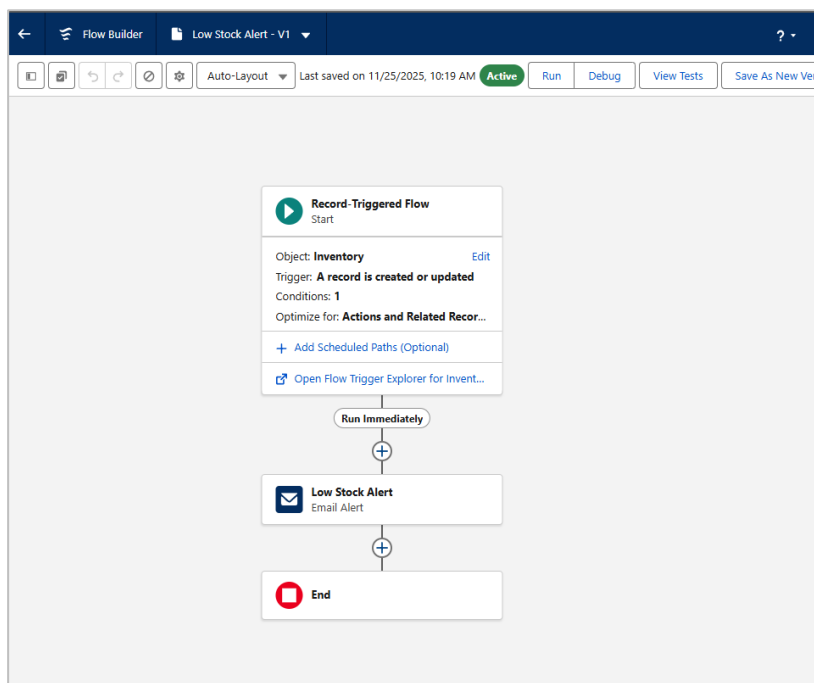
D. Automation

Order Confirmation Flow



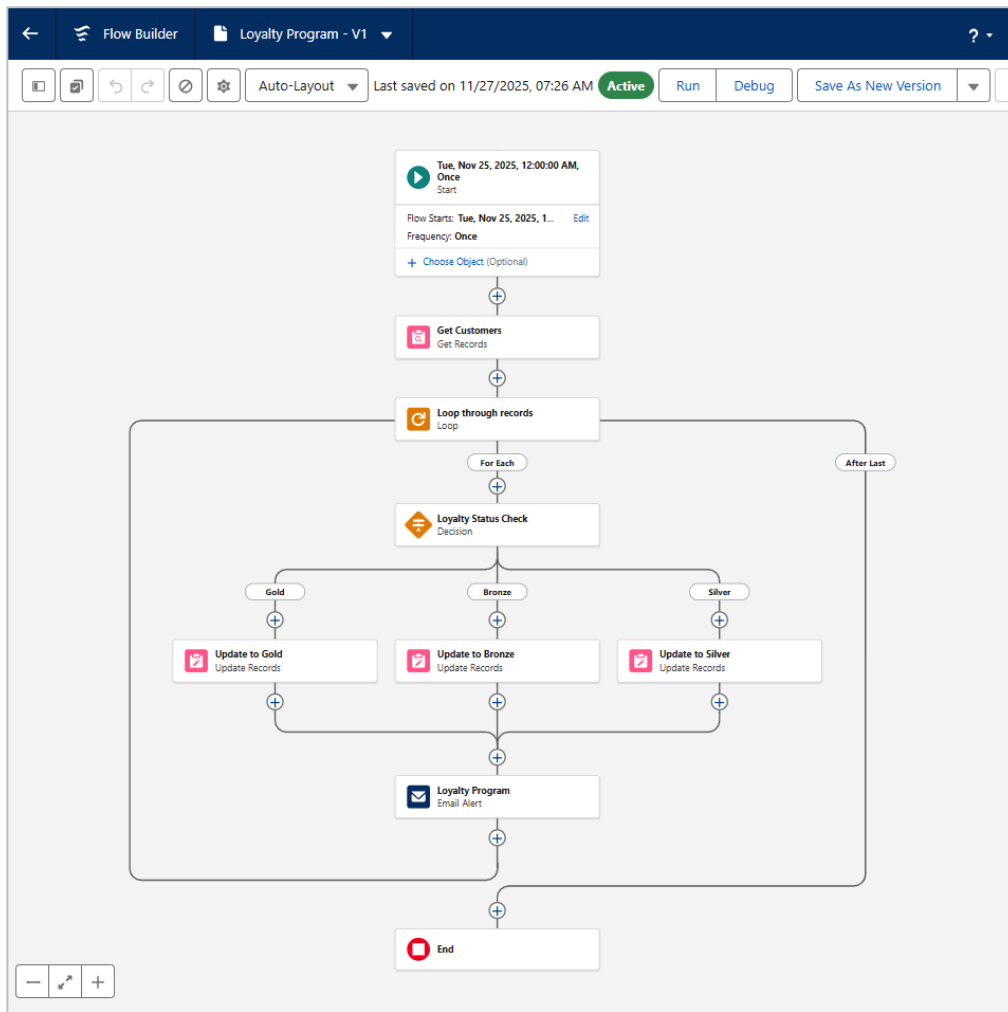
- This is the record-triggered flow for emailing customers that their order is confirmed

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 your earlier.

E. Apex Triggers

Order Total Trigger

```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt
Code Coverage: None | API Version: 65

1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12    );
13
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }
```

- Calculates the total before the order is saved

Stock Deduction Trigger

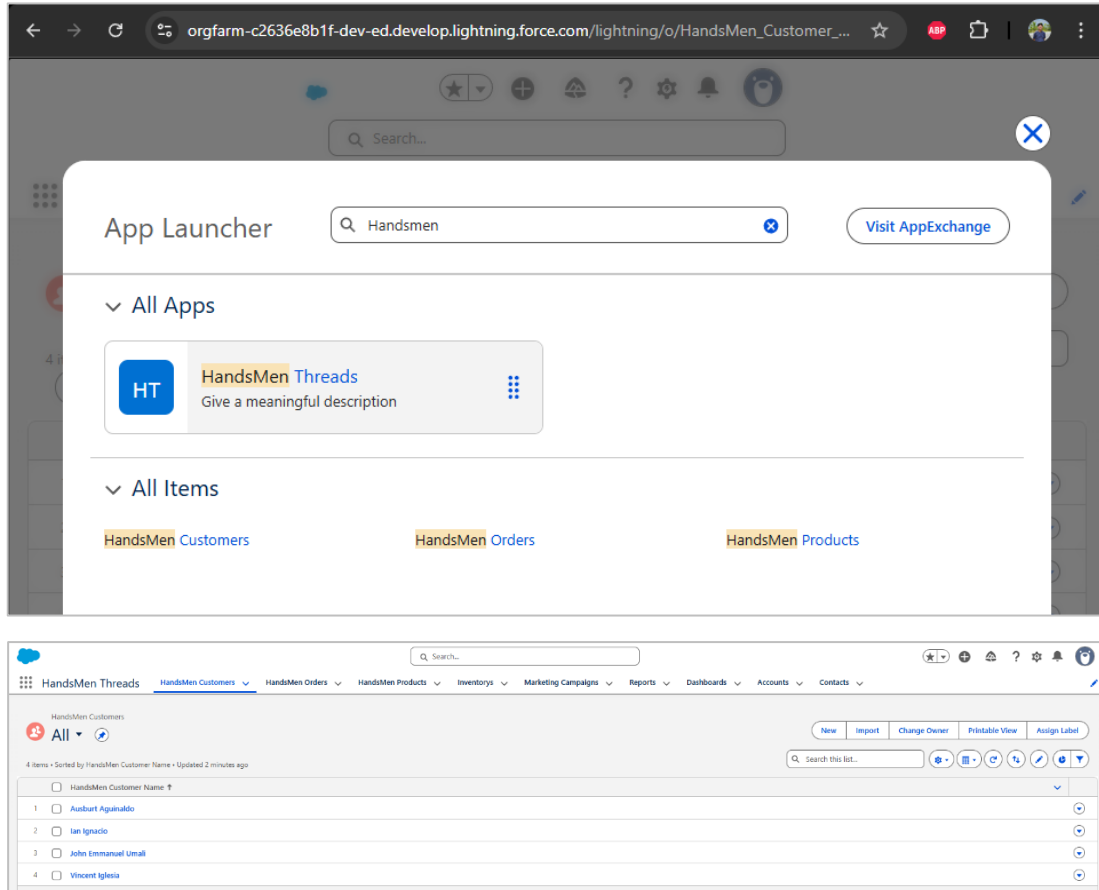
```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt
Code Coverage: None | API Version: 65

1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23            for (Inventory__c inv : inventoryMap.values()) {
24                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25                    inv.Stock_Quantity__c -= order.Quantity__c;
26                    inventoriesToUpdate.add(inv);
27                    break;
28                }
29            }
30        }
31    }
32
33    if (!inventoriesToUpdate.isEmpty()) {
34        update inventoriesToUpdate;
35    }
36 }
```

- Updates the inventory after the order is confirmed.

Phase 03: UI/UX Development & Customization

A. Lightning App Setup



- 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.

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

More

HandsMen Customers

All

New

Import

Change Owner

Printable View

Assign Label

4 items • Sorted by HandsMen Customer Name • Updated 7 minutes ago

Search this list...

	HandsMen Customer Name	
1	Ausburt Aguinaldo	
2	Ian Ignacio	
3	John Emmanuel Umali	
4	Vincent Iglesia	

HandsMen Customer Details – This shows customer information.

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Con

HandsMen Customer

Ausburt Aguinaldo

Related

Details

* = Required Information

*HandsMen Customer Name

Ausburt Aguinaldo

Owner

Aries John Tolentino

Email

ausburtaguinaldo@gmail.com

Phone

09643918733

Loyalty Status

Gold

FirstName

Ausburt

LastName

Aguinaldo

FullName

Ausburt Aguinaldo

This field is calculated upon save

Total Purchases

12

Created By

Aries John Tolentino, 11/26/2025, 1:04 AM

Last Modified By

Aries John Tolentino, 11/26/2025, 4:21 PM

Cancel

Save

Orders List – An overview of HandsMen Orders

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

More

HandsMen Orders

All

New

Import

Change Owner

Printable View

Assign Label

4 items • Sorted by HandsMen OrderNumber • Updated a few seconds ago

Search this list...

HandsMen OrderNumber ↑

1

2

3

4

O-0001

O-0002

O-0003

O-0005

Order Details – Information of each order is shown here

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

HandsMen Order

O-0001

Related

Details

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

Cancel

Save

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

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

More

HandsMen Products

All

New

Import

Change Owner

Printable View

Assign Label

4 items • Sorted by HandsMen Product Name • Updated a few seconds ago

Search this list...

HandsMen Product Name ↑

1

2

3

4

Blue Jeans

Corduroy Pants

Drift Hoodie

Oversized T-Shirt

Product Details – View of more details of each product

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Co

HandsMen Product

Oversized T-Shirt

Related

Details

* HandsMen Product Name

Oversized T-Shirt

SKU

011

Price

\$50

Stock Quantity

210

Created By

Aries John Tolentino, 11/24/2025, 6:14 PM

Owner

Aries John Tolentino

Last Modified By

Aries John Tolentino, 11/26/2025, 1:06 AM

Cancel

Save

* = Required Information

Inventory List – An overview of HandsMen Thread’s Inventory

HandsMen Threads

HandsMen Customers

HandsMen Orders

Inventories

More

Inventories

All

New

Import

Printable View

Assign Label

4 items • Sorted by Inventory Number • Updated a few seconds ago

Search this list...

Inventory Number ↑

1

I -0005

2

I -0006

3

I -0007

4

I -0008

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

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Co

Inventory

I -0005

Related

Details

Inventory Number

I -0005

HandsMen Product

Oversized T-Shirt

Stock Quantity

320

Stock Status

Available

Warehouse

Pandi, Bulacan

Created By

Aries John Tolentino, 11/26/2025, 3:57 AM

Last Modified By

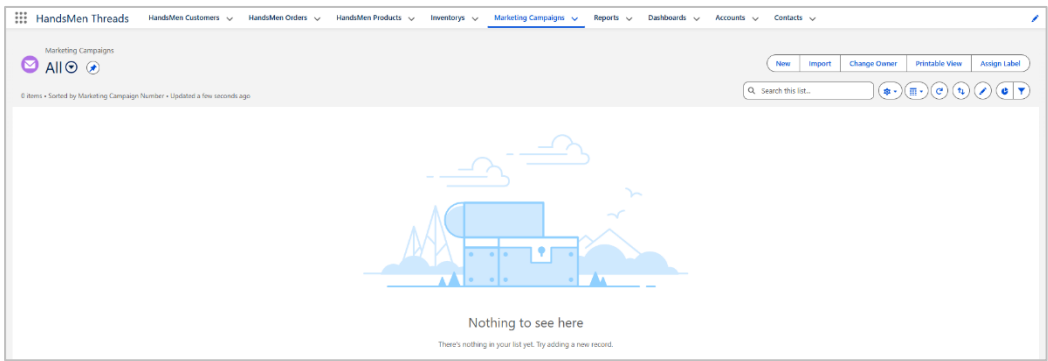
Aries John Tolentino, 11/26/2025, 3:57 AM

Cancel

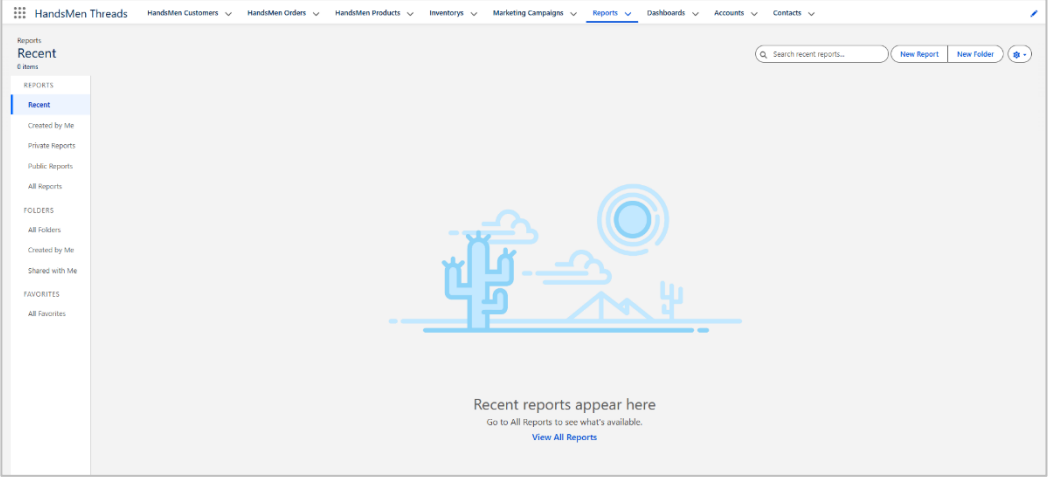
Save

* = Required Information

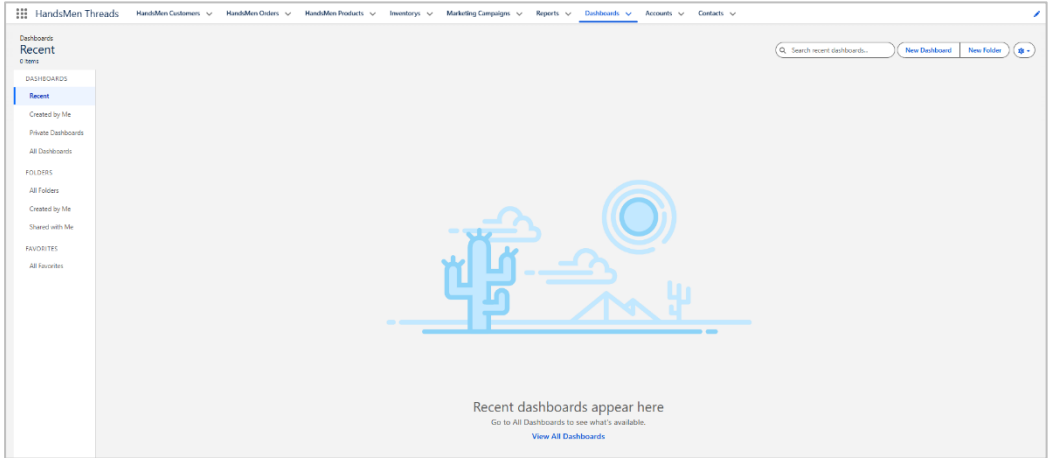
Marketing Campaigns



Reports



Dashboards



Accounts

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Accounts

All Accounts ▾

12 items - Sorted by Account Name - Updated a few seconds ago

Search this list...

⌕

⌕

⌕

⌕

⌕

⌕

<input type="checkbox"/>	Account Name ▴	Account Title ▾	Billing Status/Province	Phone	Type	Account Owner Alias	
1	Burlington Textiles Corp of America		North Carolina	(336) 222-7000	Customer - Direct	DEPIC	⌕
2	Dickinson plc		Kansas	(785) 241-6200	Customer - Channel	DEPIC	⌕
3	Edge Communications		Texas	(512) 757-6000	Customer - Direct	DEPIC	⌕
4	Engers Logistics and Transport		Oregon	(503) 421-7800	Customer - Channel	DEPIC	⌕
5	GenoPlant		California	(858) 867-3450	Customer - Channel	DEPIC	⌕
6	Grand Models & Research Ltd		Illinois	(712) 596-7000	Customer - Direct	DEPIC	⌕
7	Pyramid Construction Inc.			(874) 427-4427	Customer - Channel	DEPIC	⌕
8	Sengle Account for EndUsers					autoProc	⌕
9	iForce		California	(415) 801-7000		DEPIC	⌕
10	United Oil & Gas Corp.		New York	(212) 842-5500	Customer - Direct	DEPIC	⌕
11	United Oil & Gas, Singapore			(650) 430-8810	Customer - Direct	DEPIC	⌕
12	United Oil & Gas, UK			+44 191-4756283	Customer - Direct	DEPIC	⌕
13	University of Arizona		Arizona	(520) 773-9000	Customer - Direct	DEPIC	⌕

Contacts

HandsMen Threads

- HandsMen Customers ▾
- HandsMen Orders ▾
- HandsMen Products ▾
- Inventories ▾
- Marketing Campaigns ▾
- Reports ▾
- Dashboards ▾
- Accounts ▾
- Contacts ▾**

My Contacts ▾

Created This Quarter Done Me Search Add New List View

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

0 items • Filtered by Created Date, No, Total Contacts

Sent Email Assign Label

Get your contacts engaged

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

User Management

U

[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 User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter, Excel	Chatter	chatt.00e00000c2vaah.chdt@731nimdchatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC, OrgFam	CEPIC	pdc.562194b00a00a0afam.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	Mission, Joe	mika	prvsnho008@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input checked="" type="checkbox"/>	Mission, Kai	mika	prvsnho456@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input checked="" type="checkbox"/>	Mission, Niklas	mika	prvsnho172@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Tolkien, Arden John	arj	prvsnho773@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User, Integration	info	infotest0000000000c2vaah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User, Security	sec	insulttest0000000000c2vaah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

Phase 04: Data Migration, Testing & Security

A. Profiles

[Help for this Page](#)

Profiles

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 Definition Access](#) |
 [Enabled Pipe Access](#) |
 [Enabled Service Presence Status Access](#) |
 [Enabled Custom Permissions](#)

Profile Detail

Name	Platform 1	Edit	Clone	Delete	View Users
User License	Salesforce				
Description					
Created By	Alex John Tolentino 11/24/2025, 5:25 PM				
Modified By	Alex John Tolentino 11/24/2025, 6:43 PM				

SETUP

Profiles

Platform 1

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

[Help for this Page](#)

						A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Other	Alt
		New User		Reset Password(s)		Add Multiple Users																											
Action	Full Name +	Alias	Username	Role	Active	Profile																											
<input type="checkbox"/>	Edit Mikaelson_Ian	mika	aravishn095@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1																											
<input type="checkbox"/>	Edit Mikaelson_Kai	mika	aravishn456@gmail.com	Inventory	<input type="checkbox"/>	Platform 1																											
<input type="checkbox"/>	Edit Mikaelson_Hiklaus	mika	aravishn173@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1																											
		New User		Reset Password(s)		Add Multiple Users																											

B. Roles and Role Hierarchy

Roles

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

Collapse All Expanded All

- [-] Polytechnic University of the Philippines Santa Maria Bulacan Campus
 - [+] 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

[Help for this Page](#)

Inventory Role – Kol Mikaelson

Role

Inventory

Help for this Page

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 > Inventory

[Edit](#)
[Delete](#)

Users in Inventory Role (1)

Role Detail

Label

Inventory

Modified By

Alex 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

Assign Users to Role

New User

Users in Inventory Role Help

Sales Role – Niklaus Mikaelson

Role

Sales

Help for this Page

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
Divisions: SVP Sales & Marketing > SVP Customer Service & Support > CFO > SVP Human Resources > COO > Inventory > Marketing

Users in Sales Role (1)

Role Detail

Edit

Delete

Label	Sales	Role Name	Sales
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Alexis John Talented, 11/04/2025, 5:27 PM	Sharing Groups	Role, Role and Internal Subordinates
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 Sales Role

Assign Users to Role

New User

Users in Sales Role Help

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	arys@ohn123@gmail.com	<input checked="" type="checkbox"/>

Marketing Role – Ian Mikaelson

Role

Marketing

Help for this Page

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
Divisions: SVP Sales & Marketing > SVP Customer Service & Support > CFO > SVP Human Resources > COO > Sales > Inventory

Users in Marketing Role (1)

Role Detail

Edit

Delete

Label	Marketing	Role Name	Marketing
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Alexis John Talented, 11/04/2025, 5:27 PM	Sharing Groups	Role, Role and Internal Subordinates
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 Marketing Role

Assign Users to Role

New User

Users in Marketing Role Help

Action	Full Name	Alias	Username	Active
Edit	Ian Mikaelson	imika	arys@ohn098@gmail.com	<input checked="" type="checkbox"/>

C. Permission sets

Sales Permission Set - HandsMen Customers

Permission Set

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"/> <div>i</div>

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"/> 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"/>

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"/> i


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



[Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

[Permission Set Overview](#) > [Object Settings](#)  **Inventorys** 

Inventorys

[Edit](#)

Tab Settings

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


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



[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 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

Permission Set
Marketing Permission Set

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

Permission Set Overview > Object Settings ▼ **Marketing Campaigns** ▼

Marketing Campaigns Edit

Tab Settings

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

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"/>

D. Creation of Apex Triggers and Classes

Order Total Trigger

```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt
Code Coverage: None | API Version: 65
1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12    );
13
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }
```

Stock Deduction Trigger

```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt
Code Coverage: None | API Version: 65
1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>({
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    });
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23            for (Inventory__c inv : inventoryMap.values()) {
24                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25                    inv.Stock_Quantity__c -= order.Quantity__c;
26                    inventoriesToUpdate.add(inv);
27                    break;
28                }
29            }
30        }
31    }
32
33    if (!inventoriesToUpdate.isEmpty()) {
34        update inventoriesToUpdate;
35    }
36 }
```

Order Trigger Handler

```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt | OrderTriggerHandler.apxc
Code Coverage: None | API Version: 65
1 public class OrderTriggerHandler {
2     public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
3         for (HandsMen_Order__c order : orderList) {
4             if (order.Status__c == 'Confirmed') {
5                 if (order.Quantity__c == null || order.Quantity__c <= 500) {
6                     order.Quantity__c.addError('For Status "Confirmed", Quantity must be more than 500.');
7                 }
8             } else if (order.Status__c == 'Pending') {
9                 if (order.Quantity__c == null || order.Quantity__c <= 200) {
10                    order.Quantity__c.addError('For Status "Pending", Quantity must be more than 200.');
11                }
12            } else if (order.Status__c == 'Rejection') {
13                if (order.Quantity__c == null || order.Quantity__c != 0) {
14                    order.Quantity__c.addError('For Status "Rejection", Quantity must be 0.');
15                }
16            }
17        }
18    }
19    System.debug('All records validated successfully.');
20 }
21 }
```

Order Trigger

```
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt | OrderTriggerHandler.apxc | OrderTrigger.apxt
Code Coverage: None | API Version: 65
1 trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
2
3     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
4
5         OrderTriggerHandler.validateOrderQuantity(Trigger.new);
6
7     }
8
9 }
```

E. Testing

Creating a customer

Input

New HandsMen Customer

* = Required Information

Information

HandsMen Customer Name

Aries John Tolentino

Email

arysjohn@gmail.com

Phone

09543168611

Loyalty Status

Silver

FirstName

Aries John

LastName

Tolentino

Total Purchases

36

Owner

Aries John Tolentino

Cancel

Save & New

Save

Output

HandsMen Customer

Aries John Tolentino

HandsMen Customer "Aries John Tolentino" was created.

Related

Details

HandsMen Customer Name

Aries John Tolentino

Email

arysjohn@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

Owner

Aries John Tolentino

Last Modified By

Aries John Tolentino, 11/27/2025, 5:34 PM

Creating an order

Input

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

HandsMen Product

Blue Jeans

HandsMen Customer

Aries John Tolentino

* Customer Email

aryssjohn@gmail.com

Status

Pending

Quantity

2

Total Amount

120

Cancel

Save & New

Save

Output

HandsMen Order

O-0006

HandsMen Order "O-0006" was created.

Related

Details

HandsMen OrderNumber

O-0006

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

Owner

[Aries John Tolentino](#)

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

Owner

Aries John Tolentino

Cancel

Save & New

Save

Output

HandsMen Product

Satin Necktie

HandsMen Product "Satin Necktie" was created.

Related

Details

HandsMen Product Name

Satin Necktie

SKU

016

Price

\$15

Stock Quantity

250

Created By

Aries John Tolentino

, 11/27/2025, 5:40 PM

Owner

Aries John Tolentino

Last Modified By

Aries John Tolentino

, 11/27/2025, 5:40 PM

Creating an inventory item

Input

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

Satin Necktie

Stock Quantity

320

Warehouse

Pandj, Bulacan

Cancel

Save & New

Save

Output

Inventory

I -0009

Inventory "I-0009" was created.

Related

Details

Inventory Number

I -0009

HandsMen Product

[Satin Necktie](#)

Stock Quantity

320

Stock Status

Available

Warehouse

Pandj, 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

The screenshot shows the Salesforce Flow Builder interface for a flow named "Order Confirmation - V1". The flow is a "Record-Triggered Flow" that starts when a "HandMen Order" is updated. The trigger is configured to run "Immediately" and the flow is set to "Run when a record is updated to meet the condition requirements". The flow steps include "Run Immediately", "Order Confirmation Email Alert", and "End". The right-hand pane shows the "Configure Start" settings, including the object "HandMen Order" and the trigger "A record is updated". The "Set Entry Conditions" section shows a condition requirement of "All Conditions Are Met (AND)" with a field "Status" equal to "Confirmed".

Output

The screenshot shows an email confirmation message from Aries John Tolentino. The subject is "Your Order has been Confirmed!". The email body contains the following text:

Dear ,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Low Stock Alert Email

Input

Flow Builder

Low Stock Alert - V1

Run

Debug

View Tests

Save As New Version

Deactivate

Record-Triggered Flow

Start

Object: Inventory

Trigger: A record is created or updated

Conditions: 1

Optimize for Actions and Related Recor...

+ Add Scheduled Path (Optional)

Open Flow Trigger Explorer for Inven...

Run Immediately

Low Stock Alert

Email Alert

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Inventory

Configure Trigger

Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

Stock Quantity X

Operator

Less Than

Value

5

+ Add Condition

When to Run the Flow for Updated Records

☒ Every time a record is updated and meets the condition requirements

☐ Only when a record is updated to meet the condition requirements

Output

Low Stock Alert Email

Spam

Aries John Tolentino

aj.tolentino@bnc.salesforce.com

7:41AM (2 hours ago)

☆

🔍

↶

⋮

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

Report not spam

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low.

Product Name: Overized T-Shirt

Current Stock Quantity: 2

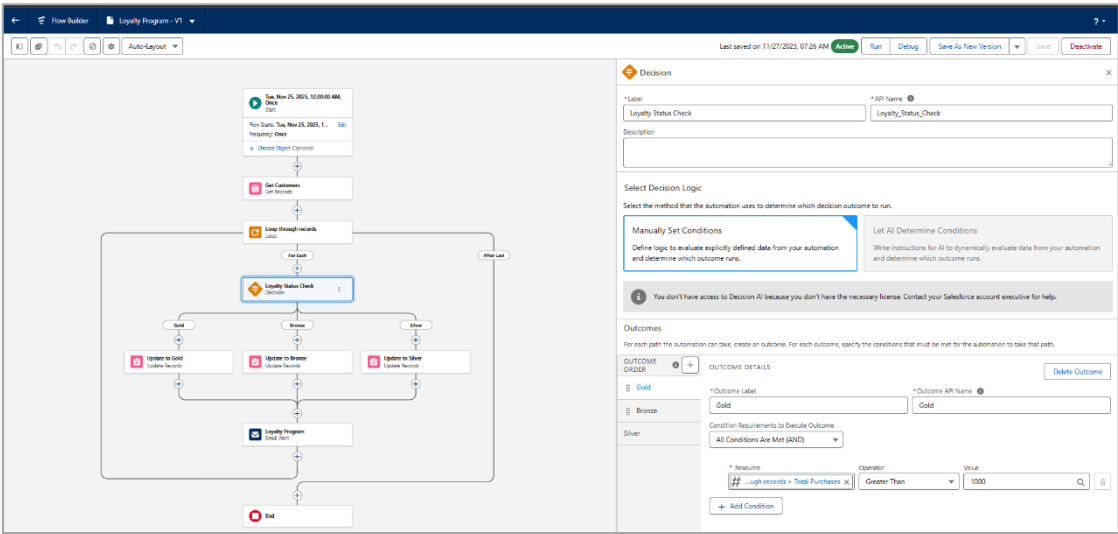
Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

Loyalty Program Email

Input



Output

HandsMen Customer	
Ian Ignacio	
Related Details	
HandsMen Customer Name	Owner
Ian Ignacio	Anes John Tolentino
Email	
anyjohn@gmail.com	
Phone	
09543168611	
Loyalty Status	
Gold	
FirstName	
Ian	
LastName	
Ignacio	
FullName	
Ian Ignacio	
Total Purchases	
1,500	
Created By	Last Modified By
Anes John Tolentino, 11/26/2025, 1:10 AM	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.