

Flores, Ethan Zander L.

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

### **Project Overview**

HandsMen Threads, an emerging leader in men's fashion, is undertaking a Salesforce CRM transformation to centralize business data, streamline operations, and elevate customer engagement. The system is designed with a robust and scalable data model capable of managing orders, inventory, customers, and loyalty programs. This solution ensures data integrity directly from the UI, enabling smooth operations and accurate reporting. The CRM also introduces automation for order confirmations, stock notifications, loyalty status updates, and scheduled bulk processing—allowing the business to operate with increased precision and efficiency.

### **Objectives**

The primary objective of this Salesforce CRM project is to modernize and automate the operational workflow of HandsMen Threads. The CRM aims to improve customer experience, strengthen inventory control, and provide real-time insights to decision-makers. It minimizes manual tasks by using automated communication processes while maintaining strict consistency and data accuracy across the organization. This system will enable the business to scale effectively, ensure proactive operations, and enhance customer loyalty through personalized interactions.

## **Requirements Analysis & Planning**

### **Understanding Business Requirements**

- Centralized storage of customer, order, product, and inventory data.
- Automated communication with customers and internal departments.
- Maintaining data accuracy through validation directly from the UI.
- Tracking loyalty status based on purchase history.
- Ensuring proactive stock management to avoid product shortages.
- Performing scheduled bulk financial and stock updates.

## Defining Project Scope and Goals

### In Scope:

- Creation of custom objects for Orders, Products, Loyalty, and Inventory.
- Automation using Flows, Email Alerts, Scheduled Flows, and Validation Rules.
- UI customization for enhanced usability.
- Role-based access to ensure proper data visibility.
- Reports & dashboards for operational insights.

### Out of Scope:

- External system integrations (POS, ERP).
- Mobile app development.

## Designing the Data Model & Security Model

### Data Model Components

- **Customer Object:** Stores customer demographics, loyalty level, and purchase history.
- **Order Object:** Tracks order quantities, order statuses, pricing, and delivery details.
- **Product & Inventory Objects:** Maintains stock levels, product details, and stock thresholds.
- **Loyalty Program Object:** Calculates and stores loyalty tiers and corresponding perks.

### Security Model Components

- Profiles and Permission Sets for Customer Service, Sales, Warehouse, and Admin.
- Role Hierarchy to control record visibility based on department.
- Validation Rules enforcing correct data entry and record integrity.

## Stakeholder Mapping

Stakeholder	Role	Responsibility
Business Owner	Sponsor	Approves scope, reviews outcomes
Sales Team	End Users	Manages customer orders
Customer Service	End Users	Handles inquiries and loyalty programs
Warehouse Team	End Users	Receives stock alerts and updates inventory
Salesforce Admin	Developer	Builds configurations, automations, and security

## Execution Roadmap

1. Requirement Gathering & Review
2. Data Model Design
3. Backend & UI Customizations
4. Automation Build (Flows, Alerts, Scheduled Jobs)
5. Testing & User Acceptance
6. Deployment to Production
7. Documentation & Knowledge Transfer

## **Salesforce Development – Backend & Configurations**

### **Environment Setup & DevOps Workflow**

- Sandbox environment creation
- Version-controlled development
- Deployment using Change Sets

### **Customizations Implemented**

- Custom Objects: Customer, Order, Product, Inventory, Loyalty
- Custom Fields for stock threshold, loyalty points, order amount, etc.
- Validation Rules ensuring accurate data entry (e.g., no negative stock, mandatory order fields).
- Automation using **Record-Triggered Flows**, **Scheduled Flows**, and **Email Alerts**.

### **Key Automations Implemented**

#### **1. Automated Order Confirmation Email**

- Trigger: Order Status = “Confirmed”
- Action: Sends branded email template to customer.

#### **2. Dynamic Loyalty Program Updates**

- Trigger: After every successful purchase
- Logic: Calculates customer's total spending, updates loyalty tier.

#### **3. Proactive Stock Alert**

- Trigger: Stock < 5 units
- Action: Email notification to warehouse for restocking.

#### **4. Scheduled Bulk Order Update**

- Frequency: Every midnight
- Process: Recalculates order totals, updates financial fields, adjusts inventory levels.

## **Apex**

- Apex helper class for loyalty tier calculations.
- Asynchronous Apex (Future/Queueable) for bulk operations.

## **UI/UX Development & Customization**

### **1. Lightning App Setup**

- Custom app: **HandsMen Threads**
- Organized tabs for Customers, Orders, Products, Inventory, and Marketing Campaigns.

### **2. Page Layouts & Dynamic Forms**

- Conditional field visibility for cleaner UI.
- Section-based grouping for fast navigation.

### **3. User Management**

- Created profiles for Sales, Inventory, and Marketing.
- Permission sets controlling advanced access (Flows).

## **Conclusion**

- The HandsMen Threads successfully establishes a streamlined, automated, and user-friendly system that enhances business operations and customer experience. Through a robust data model, well-designed UI, and powerful automation flows, the organization is positioned to manage orders, inventory, loyalty programs, and customer engagement with improved efficiency and accuracy. This project not only strengthens operational workflows but also sets the foundation for scalable future enhancements.

## Salesforce Development – Backend & Configurations

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Steps

1 Select Type

Customer Support

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Sales Development

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First name: Ethan Zander

Last name: Flores

Job title: Student

Work email: florese1@students.nu

Company: NU Laguna

Country/Region: Philippines

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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[Reset Password](#)

To easily log in later, save this URL:  
<https://orgfarm-a1c838004f-dev-ed.develop.my.salesforce.com>

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florese1668@agentforce.com

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Developer Relations

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http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home

Search Setup

SetupHomeObject Manager

Object Manager

3 items, Sorted by Label

Q handsmenSchema BuilderCreate

Label	API Name	Type	Description	Last Modified	Deployed
HandsMen Customer	HandsMen_Customer__c	Custom Object		12/5/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		12/5/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		12/5/2025	✓

philippines.myskillsworld.ai/dashboardRecently Viewed | HandsMen Custom | Object Manager | Salesforce

http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home

Search Setup

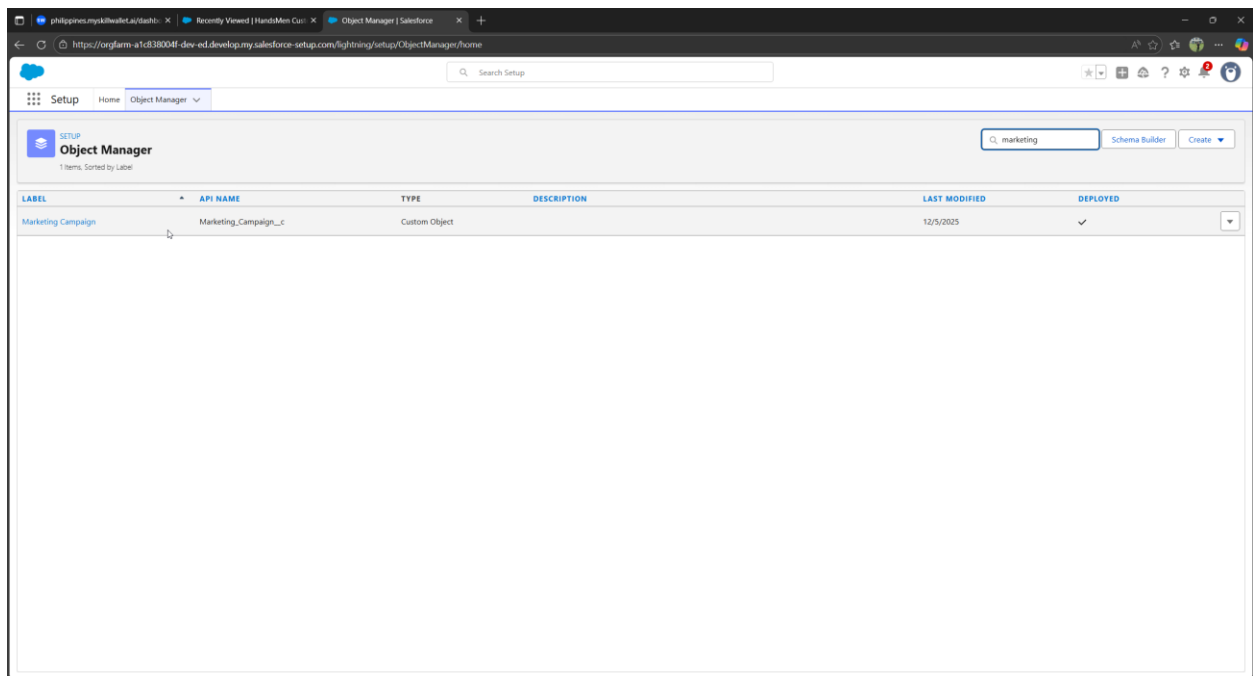
SetupHomeObject Manager

Object Manager

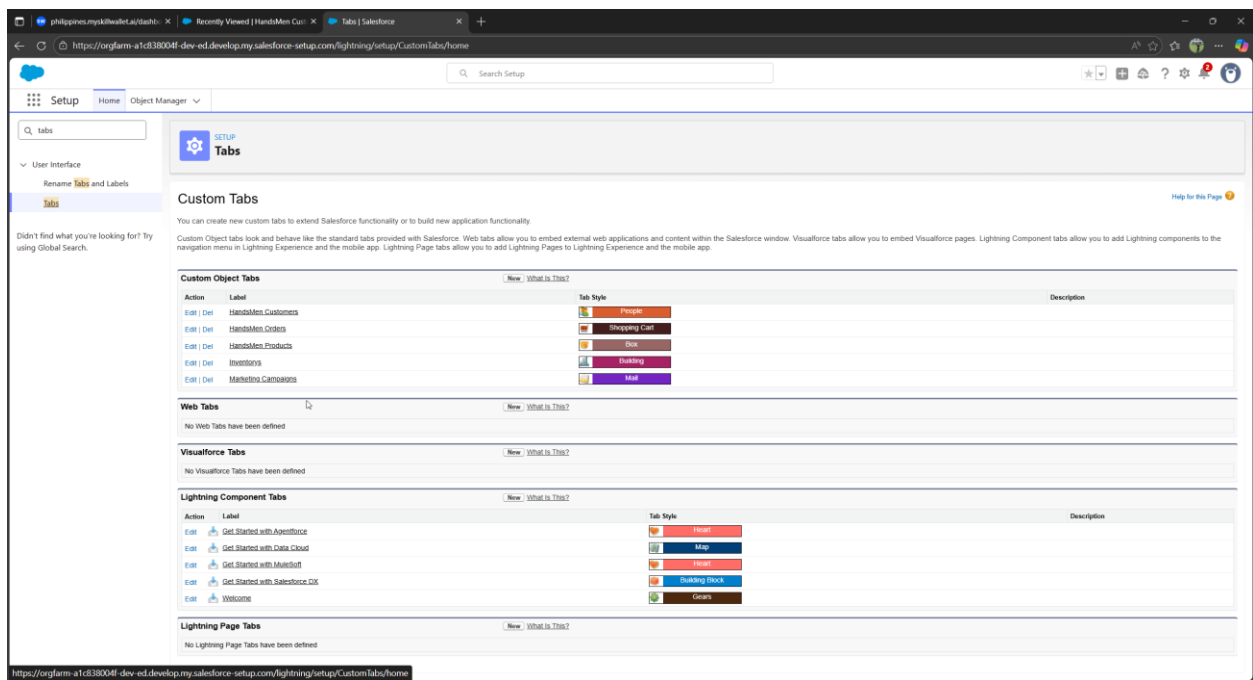
4 items, Sorted by Label

Q InventorySchema BuilderCreate

Label	API Name	Type	Description	Last Modified	Deployed
Inventory	Inventory__c	Custom Object		12/5/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			



## Data Management – Tabs





## Data Management – App Manager

The screenshot shows the Salesforce App Manager interface. The top navigation bar includes the Salesforce logo, a search bar, and various menu items like 'Setup', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The main content area is titled 'HandsMen Customers' and 'Recently Viewed'. It displays a list of 1 item, updated 2 minutes ago. The list contains one entry: 'Johan123'.

HandsMen Customer Name
Johan123

## Data Management – Fields

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Details', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', 'Object Access', 'Triggers', 'Flow Triggers', 'Validation Rules', and 'Conditional Field Formatting'. The main content area is titled 'HandsMen Customer' and 'Fields & Relationships'. It displays a table of 11 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
FirstName	FirstName_c	Text(255)		
FullName	Full_Name_c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName_c	Text(255)		
Loyalty Status	Loyalty_Status_c	Picklist		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone_c	Phone		
Total Purchases	Total_Purchases_c	Number(18, 0)		

philippines.my.salesforce.com/Setup

Recently Viewed | HandsMen Order | HandsMen Order | Salesforce

http://org1am-a1c38004f-dev-ed.develop.my.salesforce.com/lightning/setup/ObjectManager/01tgc000003u8rLjFieldsAndRelationships/view

Search Setup

Setup

Home | Object Manager

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		
HandsMen OrderNumber	Name	Auto Number		
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

philippines.my.salesforce.com/Setup

Recently Viewed | HandsMen Product | HandsMen Product | Salesforce

http://org1am-a1c38004f-dev-ed.develop.my.salesforce.com/lightning/setup/ObjectManager/01tgc000003u8rLjFieldsAndRelationships/view

Search Setup

Setup

Home | Object Manager

SETUP > OBJECT MANAGER

HandsMen Product

Details

Fields & Relationships

7 Items, Sorted by Field Label

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 Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(255)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

philippines.myskibaker.ai/dashboardRecently Viewed | HandsMen CustomInventory | Salesforce

http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011g000003UsV4fFieldsAndRelationships/view

Setup

Setup > OBJECT MANAGERInventory

Details

Fields & Relationships

7 items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet 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(16, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(255)		

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject AccessTriggersFlow TriggersValidation RulesConditional Field Formatting

philippines.myskibaker.ai/dashboardRecently Viewed | HandsMen CustomMarketing Campaign | Salesforce

http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011g000003UsV4fFieldsAndRelationships/view

Setup

Setup > OBJECT MANAGERMarketing Campaign

Details

Fields & Relationships

8 items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign Name	Campaign_Name__c	Text(255)		
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		

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject AccessTriggersFlow TriggersValidation RulesConditional Field Formatting

## Data Configuration – Validation Rules

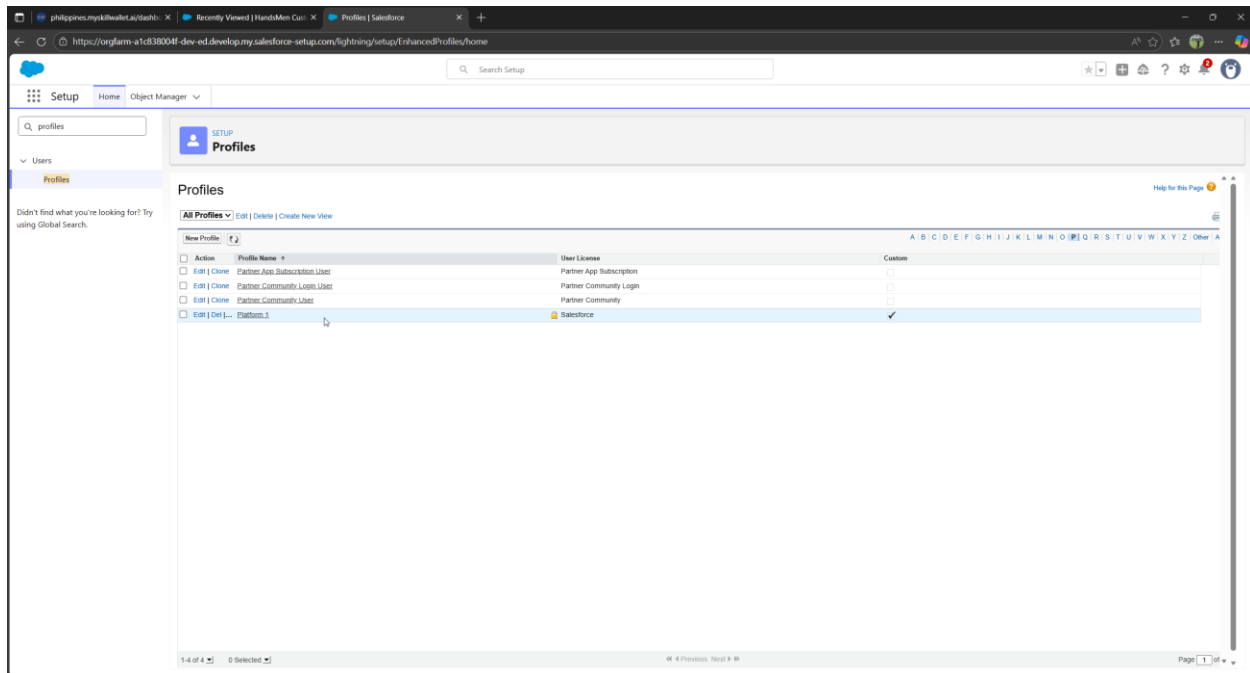
The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' org. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, **Validation Rules**, and Conditional Field Formatting. The 'Validation Rules' item is selected and highlighted. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table displays the following data:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Ethan Zander Flores, 12/5/2025, 6:51 PM

The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' org. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, **Validation Rules**, and Conditional Field Formatting. The 'Validation Rules' item is selected and highlighted. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table displays the following data:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Ethan Zander Flores, 12/5/2025, 6:45 PM

## Data Security – Profiles



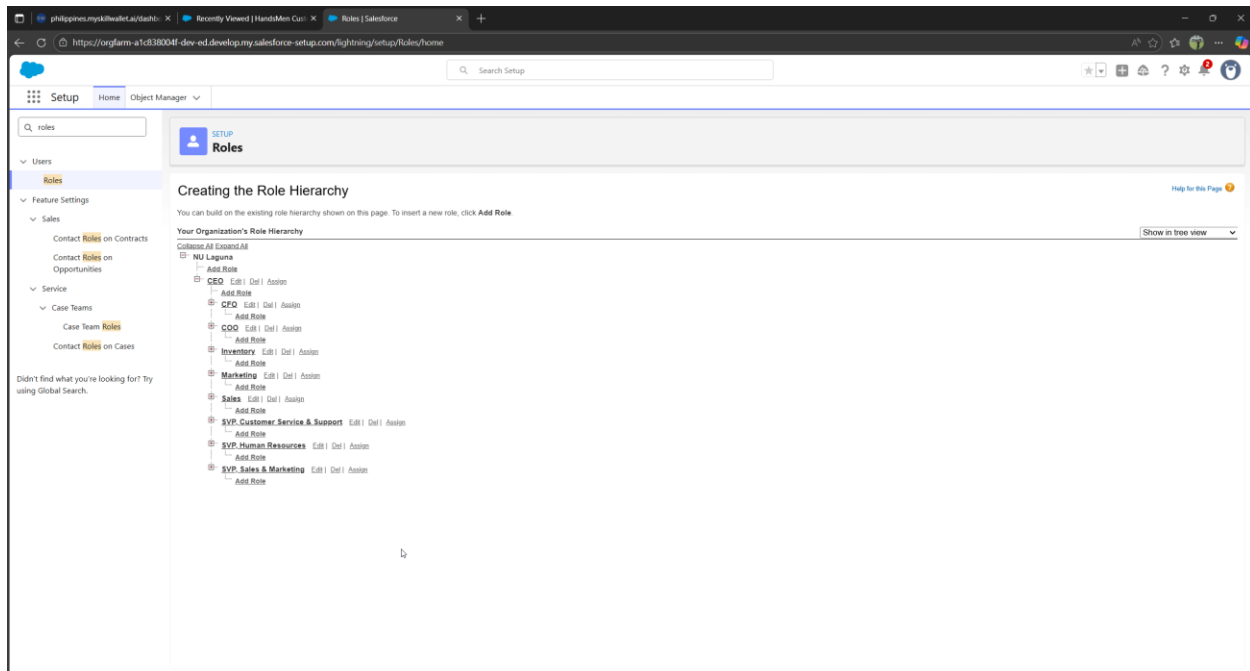
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profiles' and a list of navigation items: Users, Profiles, and a search result. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Platform\_1' profile is selected.

Action	Profile Name	User License	Custom
<a href="#">Edit</a> <a href="#">Clone</a>	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a>	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a>	Partner Community User	Partner Community	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Del</a> <a href="#">New</a>	Platform_1	Salesforce	<input checked="" type="checkbox"/>

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HandsMen Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HandsMen Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

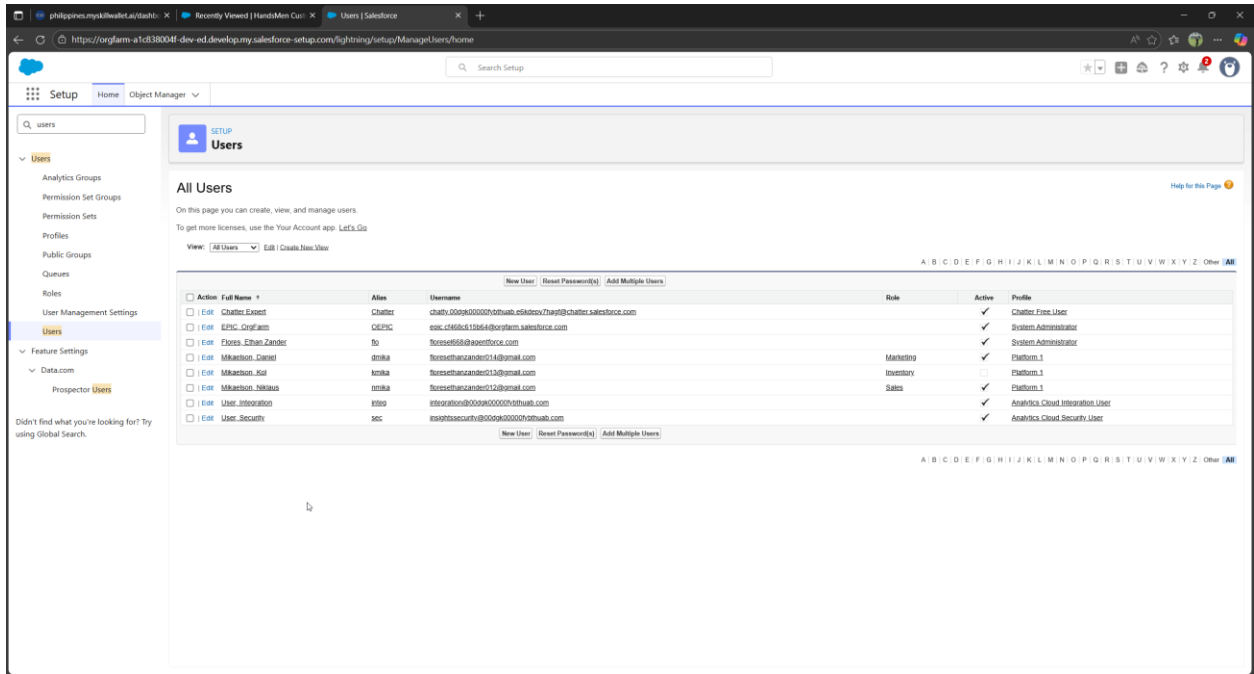
	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventorys	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Data Security – Roles

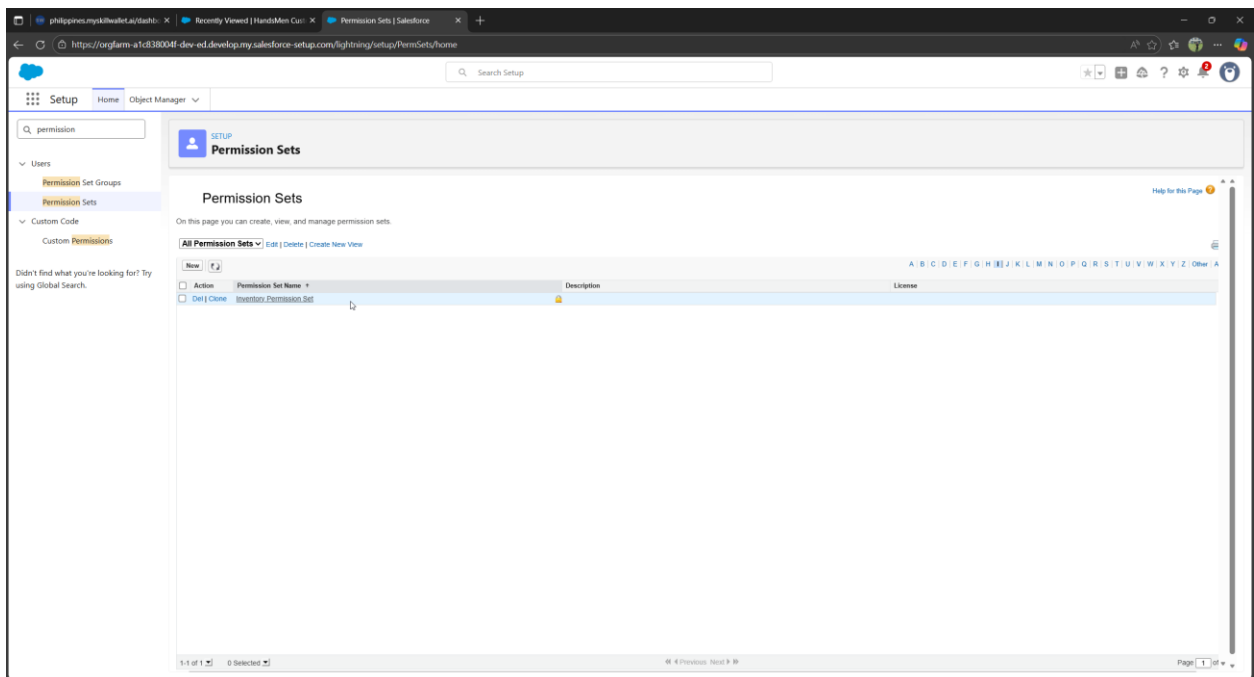


The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has a search bar with 'roles' and a list of navigation items: Users, Roles, Feature Settings, Sales, Service, Case Teams, and Cases. The main content area is titled 'Roles' and shows a tree view of the role hierarchy. The hierarchy starts with 'All Users' and branches into various roles like 'CEO', 'COO', 'Inventory', 'Marketing', 'Sales', 'SVP Customer Service & Support', 'SVP Human Resources', and 'SVP Sales & Marketing'.

## Data Security – Users



## Data Security – Permission Set



philippines.myskibw.net/sdash: X Recently Viewed | HandsMen Cui: X Permission Sets | Salesforce

http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSet/home

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

### Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Manage Assessment Surveys	Gives users access to create, edit, and delete assessment surveys used in Enablement program exerci...	Enablement Resources
<input type="checkbox"/>	Manage Enablement Analytics	Gives users access to view and configure reports and dashboards for Enablement programs.	Enablement
<input type="checkbox"/>	Manage Enablement Essentials	Gives users access to build, assign, track, and take Enablement programs, including programs that refe...	Enablement
<input type="checkbox"/>	Manage In-App Guidance	Gives users access to create, edit, and delete prompts and walkthroughs in Lightning Experience.	Enablement Resources
<input type="checkbox"/>	Marketing Cloud Reporting C2C Perm	Allows MCR app to access data from core	Cloud Integration User
<input checked="" type="checkbox"/>	Marketing Permission Set		
<input type="checkbox"/>	MarketingCloudPublishingC2CPermSet		Cloud Integration User
<input type="checkbox"/>	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
<input type="checkbox"/>	MuleSoftPublishingCapabilitiesC2CPermSet		Cloud Integration User
<input type="checkbox"/>	MuleSoftSeamlessLoginsC2CPermSet		Cloud Integration User

5/10 of 10 0 Selected 4 Previous Next 9 10 Page 1 of 1

philippines.myskibw.net/sdash: X Recently Viewed | HandsMen Cui: X Permission Sets | Salesforce

http://orglam-a1d38004f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSet/home

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

### Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Name	Description	License
<input type="checkbox"/>	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
<input type="checkbox"/>	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/>	Sales Engagement Basic User	Access basic sales automation and email productivity features, including Quick Cadences, automated e...	Sales Engagement Basic
<input checked="" type="checkbox"/>	Sales Permission Set		
<input type="checkbox"/>	Salesforce Apex Query	Gives Apex Query access to analyze code for anti patterns.	Cloud Integration User
<input type="checkbox"/>	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint.	Cloud Integration User
<input type="checkbox"/>	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Salesforce Pricing Admin	Allow org users to manage the setup pages.	Salesforce Pricing Design Time
<input type="checkbox"/>	Salesforce Pricing Design Time User	Allow create, read, update, and delete access to all design time objects.	Salesforce Pricing Design Time
<input type="checkbox"/>	Salesforce Pricing Manager	Allow create, read, and edit access to all pricing objects and features.	Salesforce Pricing Run Time
<input type="checkbox"/>	Salesforce Pricing Run Time User	Allow read access for all Salesforce Pricing objects.	Salesforce Pricing Run Time
<input type="checkbox"/>	Salesforce Scheduler Greater	Let users manage drop-in customers and customers with scheduled appointments in the branch lobby.	Salesforce Scheduler Greater
<input type="checkbox"/>	Sea3 Integrate C2C User Perm	Allows the user to access entities indexed by Sea3 indexing pipeline.	Cloud Integration User
<input type="checkbox"/>	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
<input type="checkbox"/>	Segment Intelligence User	View Segment Intelligence dashboard.	SegmentIntelligencePd
<input type="checkbox"/>	Seller Focused Sales Mobile Experience	Use an experience that's tailored for sellers on mobile. Easily view and update key information, contact...	Salesforce
<input type="checkbox"/>	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/>	Shopify	Allows access to B2C Commerce features.	Commerce User
<input type="checkbox"/>	Stack Service User	Lets users run the flows for swarming with Service Cloud for Slack.	Stack Service User
<input type="checkbox"/>	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

5/20 of 20 0 Selected 4 Previous Next 9 10 Page 1 of 1

# Email Template

The screenshot shows the Salesforce Classic Email Templates page. The left sidebar has a search bar with 'classic' entered and a list of categories: Email, Classic Email Templates, and Classic Letterheads. The main content area is titled 'Classic Email Templates' and shows a list of templates. The 'Order Confirmation Email' template is highlighted.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Appointment for Unauthenticated User using Appointment Types... For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	stc@acme	11/25/2025
Edit   Del	Appointment for Unauthenticated User using Appointment Types... For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	stc@acme	11/25/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	stc@acme	11/25/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	stc@acme	11/25/2025
Edit   Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	stc@acme	11/25/2025
Edit   Del	Commerce Receipt Portal Invitation	Custom	✓	Invite a contact to a Commerce Receipt Portal.	stc@acme	11/25/2025
Edit   Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	stc@acme	11/25/2025
Edit   Del	Low Stock Alert	Text	✓		to	12/5/2025
Edit   Del	Loyalty Program Email	HTML	✓		to	12/5/2025
Edit   Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	CEPIC	11/25/2025
Edit   Del	Order Confirmation Email	HTML	✓		to	12/5/2025
Edit   Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm rescheduling of a service appointment.	stc@acme	11/25/2025
Edit   Del	Sales New Customer Email	Text	✓	Email to new customers	CEPIC	11/25/2025
Edit   Del	Scheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a service appointment.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Payment Reminder for Service Appointment Email	Custom	✓	Email Template to remind customers to pay for their service appointment.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Service Appointment Cancellation Email	Custom	✓	Email Template to confirm the cancellation of a paid service appointment.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a paid service appointment.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Service Appointment Confirmation Email for Guest Users	Custom	✓	Email Template to confirm scheduling of a paid service appointment for guest users.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Service Appointment Rescheduled Email - Authenticated Users	Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for authenticated users.	stc@acme	11/25/2025
Edit   Del	Scheduler Payments Service Appointment Rescheduled Email - Guest Users	Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for guest users.	stc@acme	11/25/2025
Edit   Del	SUPPORT Self Service New Comment Notification (SAMPLE)	Text	✓	Sample email template that can be sent to your Self Service customers to notify them a public comment has been added to their case.	CEPIC	11/25/2025
Edit   Del	SUPPORT Self Service New User Login Information (SAMPLE)	Text	✓	Notification of login and password to new Self Service user.	CEPIC	11/25/2025
Edit   Del	SUPPORT Self Service Reset Password (SAMPLE)	Text	✓	Notification of new password when Self Service password is reset.	CEPIC	11/25/2025
Edit   Del	Support Case Assignment Notification	Text	✓	Notification to rep when case is auto-assigned.	CEPIC	11/25/2025
Edit   Del	Support Case Created (Phone Inquiries)	Text	✓	Notification to customer about case created through phone call.	CEPIC	11/25/2025

# Flows

The screenshot shows the Salesforce Flows page. The left sidebar has a search bar with 'flows' entered and a list of categories: Process Automation, Flows, Identity, and Login Flows. The main content area is titled 'Flows' and shows a list of flow definitions. The 'Order Confirmation' flow is highlighted.

Flow Label	Process Type	Active	Template	Package State	Package Name	Last Modified By	Last Modified Date
Unlink or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Ensure Refunds for Excess Funds Flow	Autolaunched Flow	✓	✓	Managed-Installed			
Even Exchange Flow	Screen Flow	✓	✓	Managed-Installed			
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	✓	✓	Managed-Installed			
Generate Appointment Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Generate Payment Link	Screen Flow	✓	✓	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Low Stock Alert	Autolaunched Flow	✓	✓	Unmanaged		Ethan Zander Flores	12/5/2025, 8:02 PM
Loyalty Program	Autolaunched Flow	✓	✓	Unmanaged		Ethan Zander Flores	12/5/2025, 11:06 PM
Messages Routed to Agents and Queues	Omni-Channel Flow	✓	✓	Managed-Installed			
Modify Guest Service Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Orchestration Flow for Recurrence Scheduler	Autolaunched Flow	✓	✓	Managed-Installed			
Order Confirmation	Autolaunched Flow	✓	✓	Unmanaged		Ethan Zander Flores	12/5/2025, 7:59 PM
Outbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Pay for Service Appointments	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Process Simple Approval	Flow Approval Processes	✓	✓	Managed-Installed			
Reassign Multiple Service Appointments	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	✓	✓	Managed-Installed			



## App Manager

The screenshot shows the Salesforce App Manager interface for 'HandsMen Customers'. The breadcrumb trail is 'HandsMen Threads > HandsMen Customers'. The 'Recently Viewed' section shows 1 item, updated 10 minutes ago. The table has a header 'HandsMen Customer Name' and one row with the value 'John123'. The table is empty below the first row.

	HandsMen Customer Name
1	John123

The screenshot shows the Salesforce App Manager interface for 'HandsMen Orders'. The breadcrumb trail is 'HandsMen Threads > HandsMen Orders'. The 'Recently Viewed' section shows 2 items, updated a few seconds ago. The table has a header 'HandsMen OrderNumber' and two rows with values '0-0003' and '0-0001'. The table is empty below the second row.

	HandsMen OrderNumber
1	0-0003
2	0-0001

philippines.myskylabs.net/dashboard Recently Viewed | HandsMen Products | Salesforce

Search...

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

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

New Import Change Owner Assign Label

Search this list...

	HandsMen Product Name
1	T-Shirt Fabric

philippines.myskylabs.net/dashboard Recently Viewed | Inventorys | Salesforce

Search...

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

Inventorys

Recently Viewed

1 item • Updated a few seconds ago

New Import Assign Label

Search this list...

	Inventory Number
1	I-0001

philipines.myskylwader.ai/dashb...Recently Viewed | Marketing Cam...Flows | Salesforce

http://orglam-a1d838004f-dev-ed.develop.lightning.force.com/lightning/r/Marketing\_Campaign\_\_c/list?filterName=\_\_Recent

Search...

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Marketing Campaigns

Recently Viewed

NewImportChange OwnerAssign Label

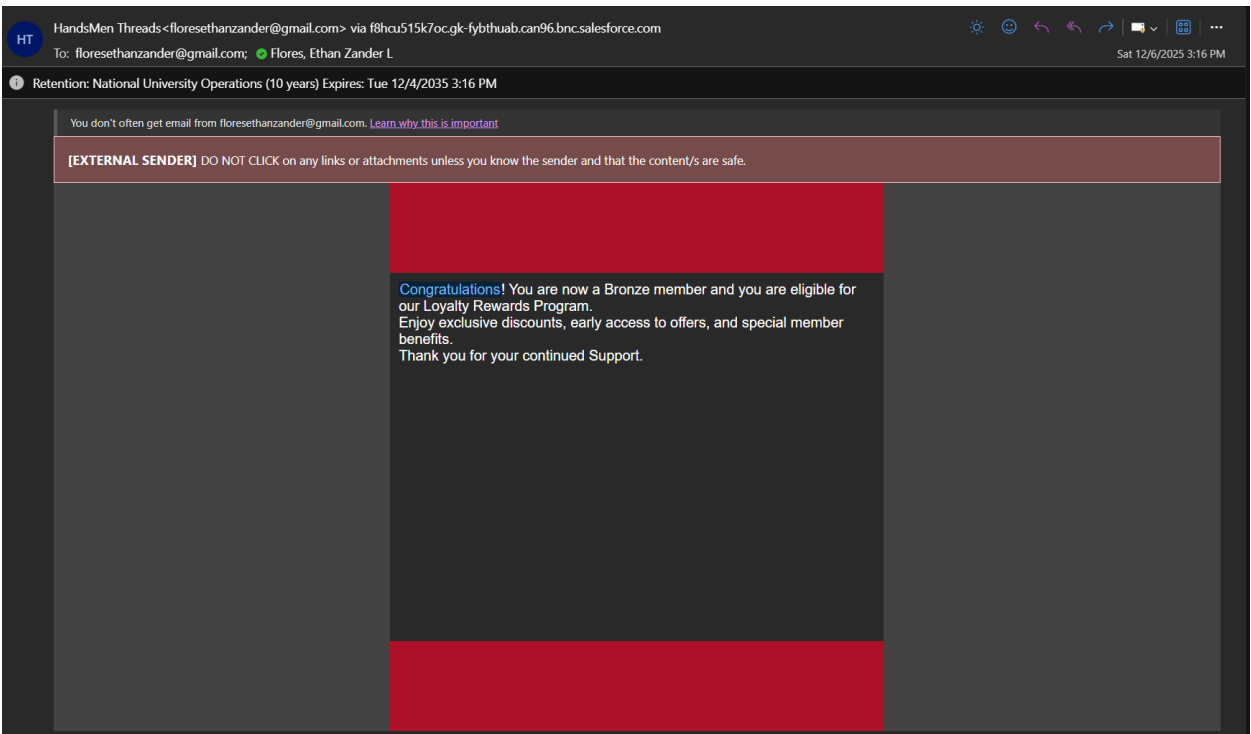
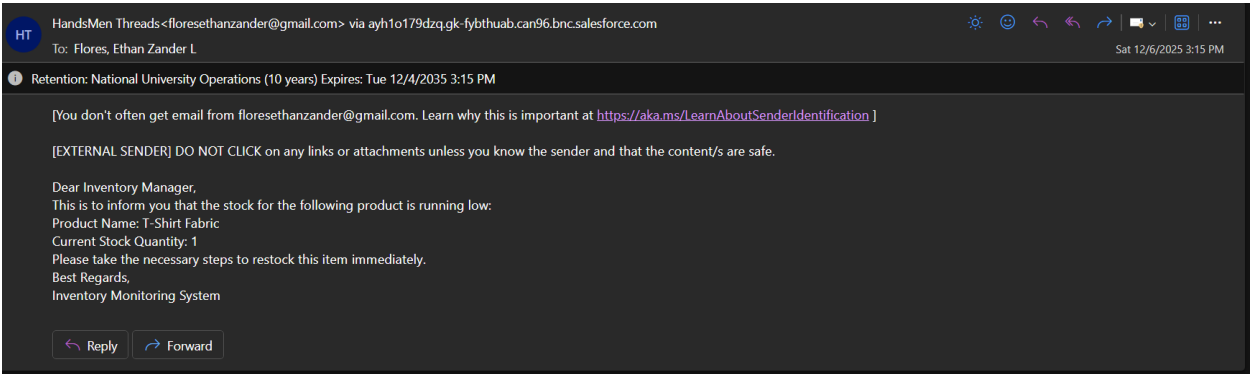
1 item • Updated a few seconds ago

Search this list...

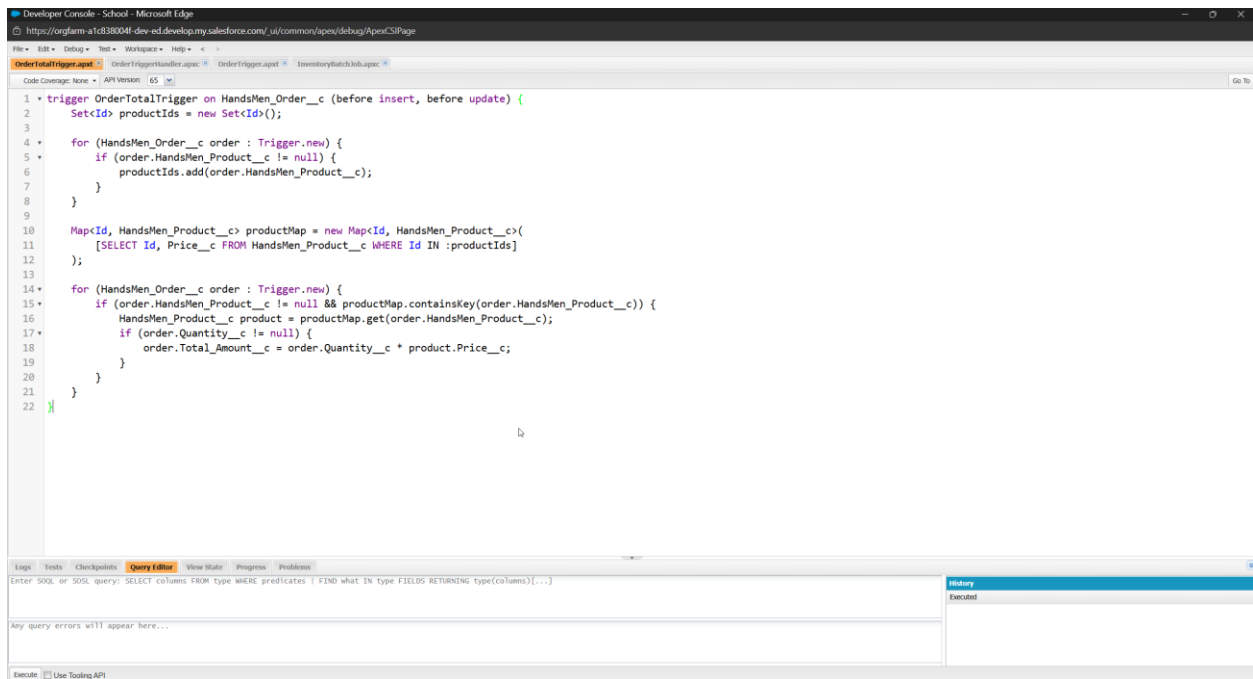
Marketing Campaign Number

1MC-0001

# Results of Creating Email Templates and Flows

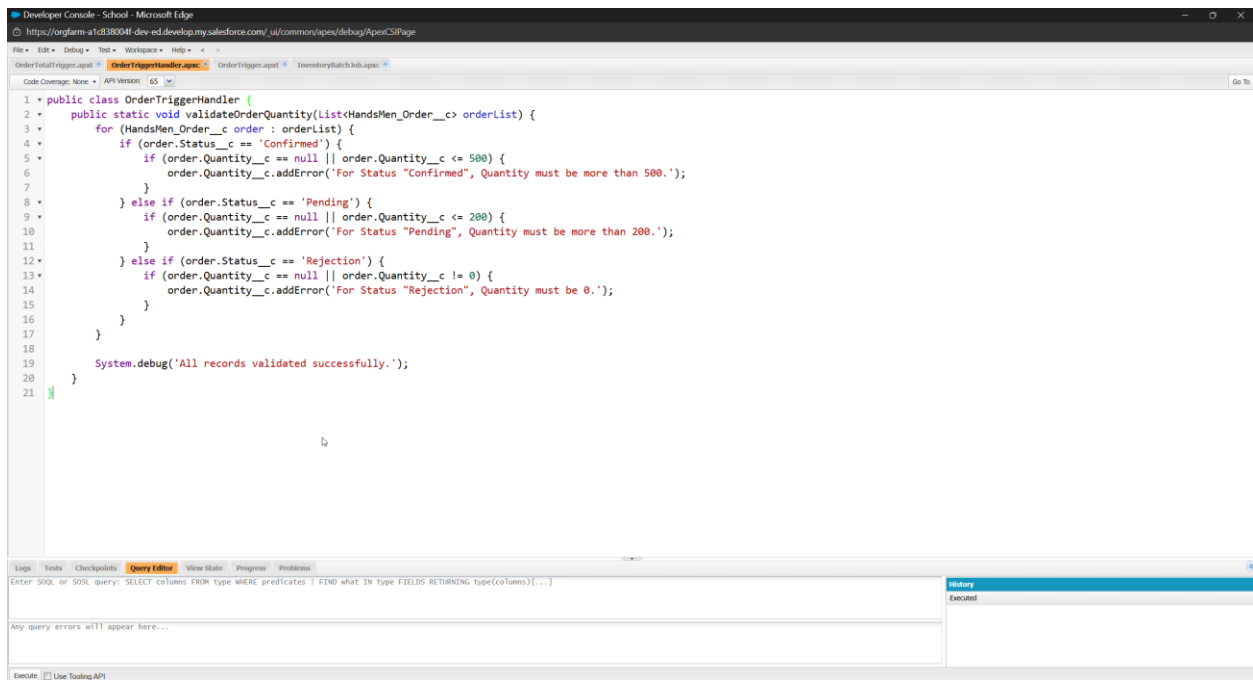


## Apex Classes and Triggers



The screenshot shows the Salesforce Developer Console with the file `OrderTotalTrigger.apex` open. The code is an Apex trigger that calculates the total amount for an order based on its items. It uses a `Map` to store product prices and iterates through the order items to calculate the total.

```
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 }
```



The screenshot shows the Salesforce Developer Console with the file `OrderTriggerHandler.apex` open. The code is an Apex class that implements a validation logic for order quantities based on their status. It uses a `for` loop to iterate through a list of orders and adds error messages to the `order.Quantity__c` field if the quantity is invalid for the given status.

```
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        System.debug('All records validated successfully.');19    }  
20 }  
21 }
```

Developer Console - School - Microsoft Edge  
https://org1am-a1c838004f-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSPPage

OrderTotalTrigger.apex | OrderTriggerHandler.apex | **OrderTrigger.apex** | InventoryBatchJob.apex

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 }
```

Logs | Tests | Checkpoints | **Query Editor** | View State | Progress | Problems

Enter SOQL or SOSL query: SELECT columns FROM type WHERE predicates | FIND what IN type FIELDS RETURNING type(columns){....}

Any query errors will appear here...

History  
Executed

Execute ☐ Use Tooling API

