

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

Project Overview

HandsMen Threads is a men's fashion brand that offers premium and custom-made clothing. The company wants to use Salesforce to make customer service better, keep data organized, and make many tasks automatic. The CRM system will help the business track customers, products, orders, inventory, and promotions. With Salesforce, the company can improve customer experience, avoid errors, save time, and grow smoothly.

Objectives

The main goal of this Salesforce project is to build a simple, organized, and automated system. This system helps the business do the following:

- Manage customer information easily
- Track custom orders with automatic confirmation emails
- Monitor stock levels in real time
- Update customer loyalty status automatically based on spending
- Help the marketing team manage promotions and customers
- Reduce manual work and mistakes
- Improve service and customer satisfaction

PHASE 1: Requirement Analysis & Planning

Understanding Business Requirements

- The business needs one place to store all customer information.
- The system must track orders clearly and send confirmation emails.
- The inventory must update correctly to avoid running out of items.
- Customer loyalty levels must update based on how much they buy.
- The marketing team needs to link customers to promotions easily.
- The system must send email alerts for important actions.

Defining Project Scope and Objectives

- Create custom objects for customers, products, orders, inventory, and campaigns.
- Add lookup and master-detail relationships for clean data structure.
- Create automation using Flows, Apex Triggers, and email alerts.
- Add validation rules to prevent wrong data.
- Build batch jobs for daily updates.
- Set up secure access using Profiles, Roles, and Permission Sets.

Data Model & Security Model

1. Object: HandsMen Customer

Fields

| Field Label | API Name | Type |
|-----------------|--------------------|---------------------------------|
| Customer Name | Customer_Name__c | Text |
| First Name | FirstName__c | Text |
| Last Name | LastName__c | Text |
| Full Name | FullName__c | Formula (Text) |
| Email | Email__c | Email |
| Phone | Phone__c | Phone |
| Loyalty Status | Loyalty_Status__c | Picklist (Gold, Silver, Bronze) |
| Total Purchases | Total_Purchases__c | Number |

2. Object: HandsMen Product

Fields

| Field Label | API Name | Type |
|--------------|-----------------|----------|
| Product Name | Product_Name__c | Text |
| SKU | SKU__c | Text |
| Price | Price__c | Currency |

3. Object: HandsMen Order

Fields

| Field | API Name | Type |
|----------------|-------------------|--|
| Order Number | Order_Number__c | Auto Number (O-{0000}) |
| Quantity | Quantity__c | Number |
| Total Amount | Total_Amount__c | Currency |
| Status | Status__c | Picklist (Confirmed, Pending, Cancelled) |
| Customer Email | Customer_Email__c | Email |

4. Object: HandsMen Inventory

Fields

| Field | API Name | Type |
|------------------|---------------------|---|
| Inventory Number | Inventory_Number__c | Auto Number (I-{0000}) |
| Stock Quantity | Stock_Quantity__c | Number |
| Stock Status | Stock_Status__c | Picklist (Available, Low Stock, Out of Stock) |
| Warehouse | Warehouse__c | Text |

5. Object: Marketing Campaign

Fields

| Field | API Name | Type |
|-----------------|--------------------|--------------|
| Campaign Number | Campaign_Number__c | Auto Number |
| Start Date | Start_Date__c | Date |
| End Date | End_Date__c | Date |
| Owner | OwnerId | Lookup(User) |

Security Model:

Profile: Platform 1

Roles:

- Marketing
- Inventory
- Sales

Role 1: Marketing

Label: Marketing

Role Name: Marketing

Reports To: CEO

Access Settings:

| Setting | Meaning |
|--------------------|--|
| Opportunity Access | Users in this role can edit all opportunities linked to accounts they own (even if another user owns the opportunity). |
| Case Access | Users in this role can edit all cases linked to accounts they own. |

Role 2: Inventory

Label: Inventory

Role Name: Inventory

Reports To: CEO

Access Settings:

| Setting | Meaning |
|--------------------|---|
| Opportunity Access | Can edit all opportunities linked to accounts they own. |
| Case Access | Can edit all cases linked to accounts they own. |

Role 3: Sales

Label: Sales

Role Name: Sales

Reports To: CEO

Access Settings:

| Setting | Meaning |
|--------------------|---|
| Opportunity Access | Can edit all opportunities linked to accounts they own. |
| Case Access | Can edit all cases linked to accounts they own. |

Stakeholder Mapping

| Stakeholder | Role |
|-------------------|----------------------------------|
| Sales Manager | Handles orders and customers |
| Inventory Manager | Checks and updates stock |
| Marketing Team | Handles campaigns and promotions |

Execution RoadMap

1. Gather Requirements
2. Design Data Model
3. Build Automations
4. Customize UI
5. Test the System
6. Deploy
7. Train Users
8. Support After Go-Live

PHASE 2: Salesforce Development – Backend & Configurations

Environment Setup: Special Configuration Trailhead Playground

Custom Object & Field Creation

Custom Objects:

| Object | Type | Purpose |
|--------------------|-------------|----------------------------|
| HandsMen Customer | Text | Saves customer information |
| HandsMen Product | Text | Saves product details |
| HandsMen Order | Auto Number | Saves customer orders |
| Inventory | Auto Number | Tracks product stock |
| Marketing Campaign | Auto Number | Stores promotion details |

Screenshot:

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of custom objects with the following columns: Label, API Name, Type, Description, Last Modified, and Deployed. The objects listed are Marketing Campaign, Inventory, HandsMen Order, HandsMen Product, and HandsMen Customer, all of which are Custom Objects last modified on 11/8/2025.

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|--------------------|-----------------------|---------------|-------------|---------------|----------|
| Marketing Campaign | Marketing_Campaign__c | Custom Object | | 11/8/2025 | ✓ |
| Inventory | Inventory__c | Custom Object | | 11/8/2025 | ✓ |
| HandsMen Order | HandsMen_Order__c | Custom Object | | 11/8/2025 | ✓ |
| HandsMen Product | HandsMen_Product__c | Custom Object | | 11/8/2025 | ✓ |
| HandsMen Customer | HandsMen_Customer__c | Custom Object | | 11/8/2025 | ✓ |

Relationships:

- Marketing Campaign → HandsMen Customer (Lookup)
- HandsMen Order → HandsMen Product (Lookup)
- HandsMen Order → Customer (Lookup)
- Inventory → Product (Master-Detail)

Screenshots:

The screenshot shows the Marketing Campaign Fields & Relationships page. On the left, there is a sidebar with options like 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, and Restriction Rules. The main area shows a table titled "Fields & Relationships" with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. One relationship is visible: HandsMen Customer (Field Label) is mapped to HandsMen_Customer__c (Field Name), Data Type is Lookup(HandsMen Customer), and it is indexed.

| 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 | | |

Setup > OBJECT MANAGER

HandsMen Order

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

Setup > OBJECT MANAGER

HandsMen Order

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

Setup > OBJECT MANAGER

Inventory

| Fields & Relationships | | | | | |
|--------------------------------|------------------|---------------------|---------------------------------|-------------------|---------|
| 7 Items, Sorted by Field Label | | | | | |
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Details | Created By | CreatedById | Lookup(User) | | |
| Fields & Relationships | HandsMen Product | HandsMen_Product__c | Master-Detail(HandsMen Product) | | |
| Page Layouts | Inventory Number | Name | Auto Number | | |
| Lightning Record Pages | Last Modified By | LastModifiedById | Lookup(User) | | |
| Buttons, Links, and Actions | Stock Quantity | Stock_Quantity__c | Number(18, 0) | | |
| Compact Layouts | Stock Status | Stock_Status__c | Formula (Text) | | |
| Field Sets | Warehouse | Warehouse__c | Text(60) | | |
| Object Limits | | | | | |
| Record Types | | | | | |
| Related Lookup Filters | | | | | |
| Search Layouts | | | | | |
| List View Button Layout | | | | | |
| Restriction Rules | | | | | |
| Scoping Rules | | | | | |
| Object Access | | | | | |
| Triggers | | | | | |

Validation Rules Created

HandsMen Order – Total Amount

- **Formula:** Total_Amount__c <= 0
- **Error:** “Please Enter Correct Amount”

Screenshot:

The screenshot shows the 'HandsMen Order Validation Rule' page in the Salesforce Object Manager. The rule is named 'Total_Amount' and has the formula 'Total_Amount__c <= 0'. The error message is 'Please Enter Correct Amount'. The rule is active and located at the 'Total Amount' field. It was created by Gervyn Clyde San Diego on 11/8/2025, 9:17 PM.

Inventory – Stock Quantity

- **Formula:** Stock_Quantity__c <= 0
- **Error:** “The inventory count is never less than zero.”

Screenshot:

The screenshot shows the 'Inventory Validation Rule' page in the Salesforce Object Manager. The rule is named 'Stock_Quantity' and has the formula 'Stock_Quantity__c <= 0'. The error message is 'the inventory count is never less than zero'. The rule is active and located at the 'Top of Page'. It was created by Gervyn Clyde San Diego on 11/8/2025, 9:20 PM.

HandsMen Customer – Email

- **Formula:** NOT CONTAINS>Email__c, "@gmail.com"
- **Error:** “Please fill Correct Gmail.”

Screenshot:

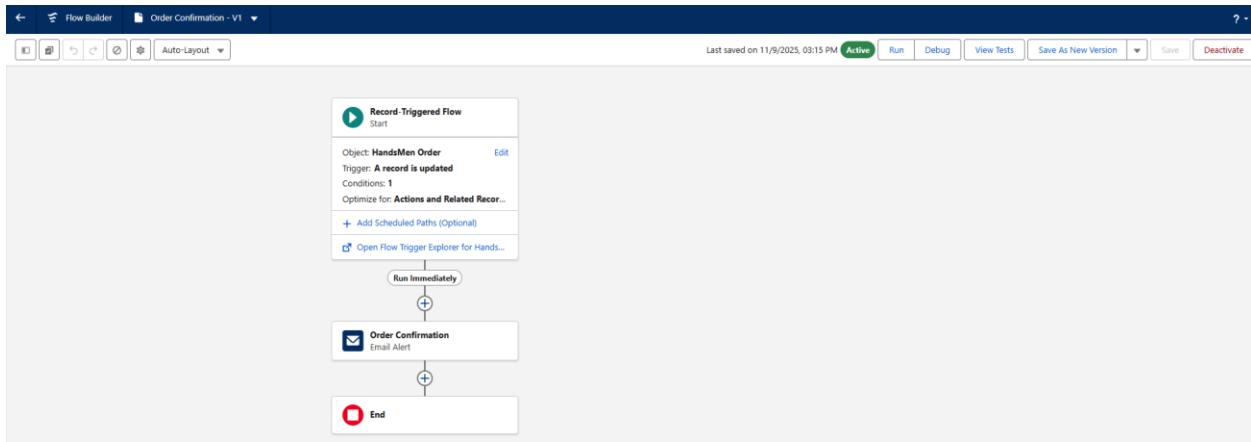
The screenshot shows the 'HandsMen Customer Validation Rule' page in the Salesforce Object Manager. The rule is named 'Email' and has the formula 'NOT CONTAINS>Email__c, '@gmail.com''. The error message is 'Please fill Correct Gmail'. The rule is active and located at the 'Top of Page'. It was created by Gervyn Clyde San Diego on 11/8/2025, 9:21 PM.

Automation (Flows)

1. Order Confirmation Email Flow

- Runs when order status becomes “Confirmed”
- Sends email to customer

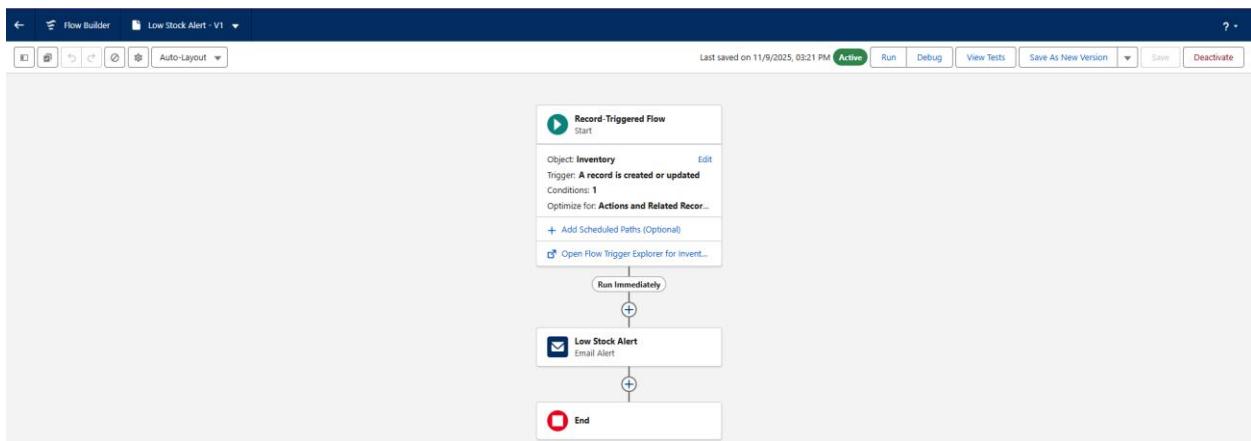
Screenshot:



2. Low Stock Alert Flow

- Runs when stock is less than 5
- Sends email to Inventory Manager

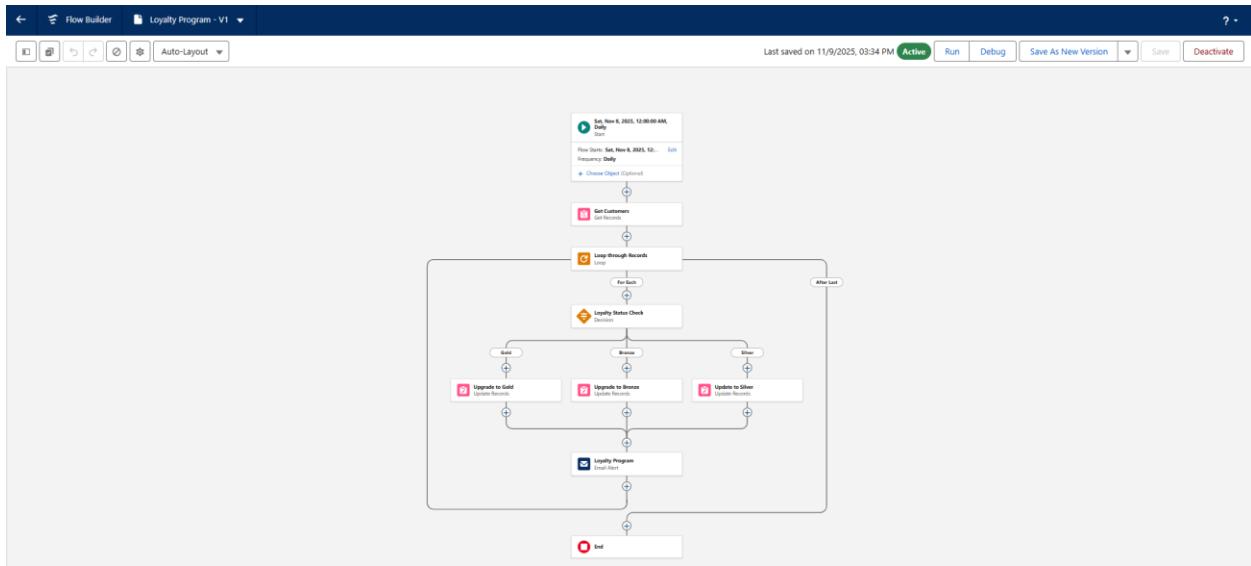
Screenshot:



3. Loyalty Program Flow

- Scheduled daily
- Updates customer level (Bronze, Silver, Gold)

Screenshot:



Apex Triggers:

Stock Deduction Trigger

- Deducts product stock when an order is confirmed

Screenshot:

The screenshot shows the Apex Trigger Detail page for "StockDeductionTrigger". The trigger is defined as follows:

```
trigger StockDeductionTrigger on HandiMen_Order__c (after insert, after update) {
    Set<String> products = new Set<String>();
    for (HandiMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            products.add(order.HandsMen_Product__c);
        }
    }
    if (products.isEmpty()) return;
    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        FROM M_Stock_Quantity__c
        WHERE HandsMen_Product__c IN products
    );
    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
    for (HandiMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (M_Stock_Quantity__c stock : inventoryMap.get(order.HandsMen_Product__c)) {
                if (stock.Quantity__c >= order.Quantity__c) {
                    stock.Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(stock);
                }
            }
        }
    }
    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

Order Total Trigger

- Checks if the order quantity is valid

Screenshot

The screenshot shows the Apex Triggers page in the Salesforce Setup. A search bar at the top left contains the text 'apex'. On the left, a sidebar lists various Apex categories: Email, Custom Code, Classes, Settings, Triggers, Application Test Execution, and Environments. Under 'Apex Triggers', there is a single entry: 'OrderTotalTrigger'. The main content area displays the 'Apex Trigger Detail' for 'OrderTotalTrigger'. The trigger code is as follows:

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

Scheduled Batch Job

- Runs every midnight to update inventory and financial numbers

Screenshot:

The screenshot shows the Developer Console in Google Chrome, connected to the URL http://orgfarm-ac791f46ba-dev-ed.develop.my.salesforce.com/_ui/common/apex. The title bar says 'Developer Console - Google Chrome'. The code editor window contains the 'InventoryBatchJob.apex' file. The code implements a scheduled batchable job to restock products with low stock levels:

```
1 * global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3     global Database.QueryLocator start(Database.BatchableContext BC) {
4
5         return Database.getQueryLocator(
6
7             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9         );
10    }
11
12    global void execute(Database.BatchableContext BC, List<SObject> records) {
13
14        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
15
16        // Cast SObject list to Product__c list
17        for (SObject record : records) {
18
19            HandsMen_Product__c product = (HandsMen_Product__c) record;
20
21            product.Stock_Quantity__c += 50; // Restock logic
22
23            productsToUpdate.add(product);
24
25        }
26
27    }
28
29    if (!productsToUpdate.isEmpty()) {
30
31        try {
32
33            update productsToUpdate;
34
35        } catch (DmlException e) {
36
37            System.debug('Error updating inventory: ' + e.getMessage());
38
39        }
40
41    }
42
43    }
44
45    global void finish(Database.BatchableContext BC) {
46
47        System.debug('Inventory Sync Completed');
48
49    }
50
51    // Scheduler Method
52
53    global void execute(SchedulableContext SC) {
54
55        InventoryBatchJob batchJob = new InventoryBatchJob();
56
57        Database.executeBatch(batchJob, 200);
58
59    }
60
61 }
```

PHASE 3: UI/UX Development & Customization

Lightning App Setup

The HandsMen Threads app includes:

- Navigation Tabs for each object
- Easy access for HandsMen Thread users

Screenshot:

The screenshot displays the Lightning App Builder interface for the HandsMen Threads app. At the top, there's a navigation bar with tabs for 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Below the navigation bar, the main content area shows a 'Recently Viewed' list with one item: 'john'. There are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar labeled 'Search this list...' is also present. In the bottom half of the screen, the 'App Settings' tab is selected, specifically the 'Navigation Items' section. This section has two panels: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' panel lists various Salesforce objects like 'Activation Targets', 'Activations', 'All Sites', etc. The 'Selected Items' panel contains 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Arrows between the two panels indicate the ability to move items between them.

Page Layouts

Page layouts designed for:

- HandsMen Customer
- HandsMen Order
- HandsMen Product
- Inventory

Screenshots:

The image displays three separate screenshots of a CRM-like application interface, likely Salesforce, for the HandsMen brand. Each screenshot shows a 'Details' page for a specific entity.

Screenshot 1: HandsMen Customer - john

This screenshot shows the 'john' customer record. The 'Owner' is listed as 'Gervyn Clyde San Diego'. The 'Last Modified By' field shows 'Gervyn Clyde San Diego, 11/8/2025, 10:27 PM'. Other fields include HandsMen Customer Name (john), Email (dydesantos1209@gmail.com), Loyalty Status (Bronze), First Name (john), Last Name (Doe), Full Name (john Doe), Total Purchases (400), and Created By (Gervyn Clyde San Diego, 11/8/2025, 10:27 PM).

Screenshot 2: HandsMen Order - O-0004

This screenshot shows the 'O-0004' order record. The 'Owner' is 'Gervyn Clyde San Diego'. The 'Last Modified By' field shows 'Gervyn Clyde San Diego, 11/18/2025, 1:02 AM'. Other fields include HandsMen OrderNumber (O-0004), HandsMen Product (shorts), HandsMen Customer (john), Status (Confirmed), Quantity (100), Total Amount (300), and Customer Email (dydesantos1209@gmail.com). The order was created by Gervyn Clyde San Diego on 11/18/2025, 1:02 AM.

Screenshot 3: HandsMen Products - shorts

This screenshot shows the 'shorts' product record. The 'Owner' is 'Gervyn Clyde San Diego'. The 'Last Modified By' field shows 'Gervyn Clyde San Diego, 11/8/2025, 10:28 PM'. Other fields include HandsMen Product Name (shorts), SKU (SKU), Price (\$3), and Stock Quantity.

Inventory I -0001

Related Details

Inventory Number
I -0001

HandsMen Product
shorts

Stock Quantity
598

Stock Status
Available

Warehouse

Created By
Gervyn Clyde San Diego, 11/8/2025, 10:28 PM

Last Modified By
Gervyn Clyde San Diego, 11/18/2025, 1:02 AM

User Management

Users assigned to roles:

- Sales Manager
- Inventory Manager
- Marketing Manager

Screenshot:

| New User Reset Password(s) Add Multiple Users | | | | | | |
|---|--------------------|-------|---------------------------|-----------|-------------------------------------|------------|
| Action | Full Name | Alias | Username | Role | Active | Profile |
| <input type="checkbox"/> Edit | Mikaelson, Elijah | emika | elli_no2v@gmail.com | Marketing | <input checked="" type="checkbox"/> | Platform 1 |
| <input type="checkbox"/> Edit | Mikaelson, Kol | kmika | kolmikemivyaamo@gmail.com | Inventory | <input type="checkbox"/> | Platform 1 |
| <input type="checkbox"/> Edit | Mikaelson, Niklaus | nmika | orjanas_0910@gmail.com | Sales | <input checked="" type="checkbox"/> | Platform 1 |

PHASE 4: Testing & Security

Security Settings:

Profiles (Platform 1)

- HandsMen Products: Read, Create
- Inventory: Read, Create, Edit

Screenshot:

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays object permissions for three custom objects: HandsMen Customers, HandsMen Orders, and HandsMen Products. The permissions are categorized into Basic Access (Read, Create, Edit, Delete) and Dang Administer (View All Records, Modify All Records, View All Fields). The HandsMen Products object has specific permissions assigned.

| Object | Basic Access | | | | Dang Administer | | |
|--------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | 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"/> |

Roles

- Sales Manager under CEO
- Inventory Manager under CEO
- Marketing Manager under CEO

Screenshot:

The screenshot shows the Salesforce Setup interface under the Roles section. It lists various roles such as CEO, CFO, COO, Inventory, Marketing, Sales, SVP Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, SVP Human Resources, SVP Sales & Marketing, VP International Sales, VP Marketing, Marketing Team, VP North American Sales, Director Channel Sales, Channel Sales Team, Director Direct Sales, Eastern Sales Team, and Western Sales Team. The roles are listed in a table with columns for Action, Role, Reports To, and Report Display Name.

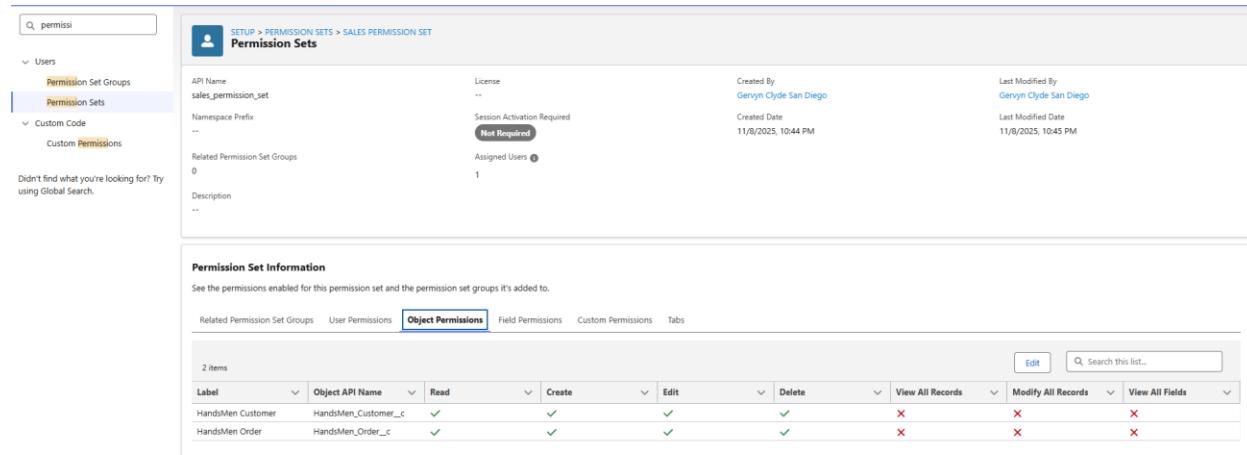
| Action | Role | Reports To | Report Display Name |
|---------------------|--------------------------------|--------------------------------|--------------------------------|
| Edit Del Assign | CEO | CEO | CEO |
| Edit Del Assign | CFO | CEO | CFO |
| Edit Del Assign | COO | CEO | COO |
| Edit Del Assign | Inventory | CEO | |
| Edit Del Assign | Marketing | CEO | |
| Edit Del Assign | Sales | CEO | |
| Edit Del Assign | SVP Customer Service & Support | SVP Customer Service & Support | SVP Customer Service & Support |
| Edit Del Assign | Customer Support International | SVP Customer Service & Support | Customer Support International |
| Edit Del Assign | Customer Support North America | SVP Customer Service & Support | Customer Support North America |
| Edit Del Assign | Installation & Repair Services | SVP Customer Service & Support | Installation & Repair Services |
| Edit Del Assign | SVP Human Resources | CEO | SVP Human Resources |
| Edit Del Assign | SVP Sales & Marketing | CEO | SVP Sales & Marketing |
| Edit Del Assign | VP International Sales | SVP Sales & Marketing | VP International Sales |
| Edit Del Assign | VP Marketing | SVP Sales & Marketing | VP Marketing |
| Edit Del Assign | Marketing Team | VP Marketing | Marketing Team |
| Edit Del Assign | VP North American Sales | SVP Sales & Marketing | VP North American Sales |
| Edit Del Assign | Director Channel Sales | VP North American Sales | Director Channel Sales |
| Edit Del Assign | Channel Sales Team | Director Channel Sales | Channel Sales Team |
| Edit Del Assign | Director Direct Sales | VP North American Sales | Director Direct Sales |
| Edit Del Assign | Eastern Sales Team | Director Direct Sales | Eastern Sales Team |
| Edit Del Assign | Western Sales Team | Director Direct Sales | Western Sales Team |

Permission Sets

Extra permissions for specific users.

Screenshots:

Sales:



The screenshot shows the 'Permission Sets' page for the 'Sales' permission set. The main details section includes:

| API Name | License | Created By | Last Modified By |
|----------------------|-----------------------------|-----------------------|-----------------------|
| sales_permission_set | -- | Genyn Clyde San Diego | Genyn Clyde San Diego |
| Namespace Prefix | Session Activation Required | Created Date | Last Modified Date |
| -- | Not Required | 11/8/2025, 10:44 PM | 11/8/2025, 10:45 PM |

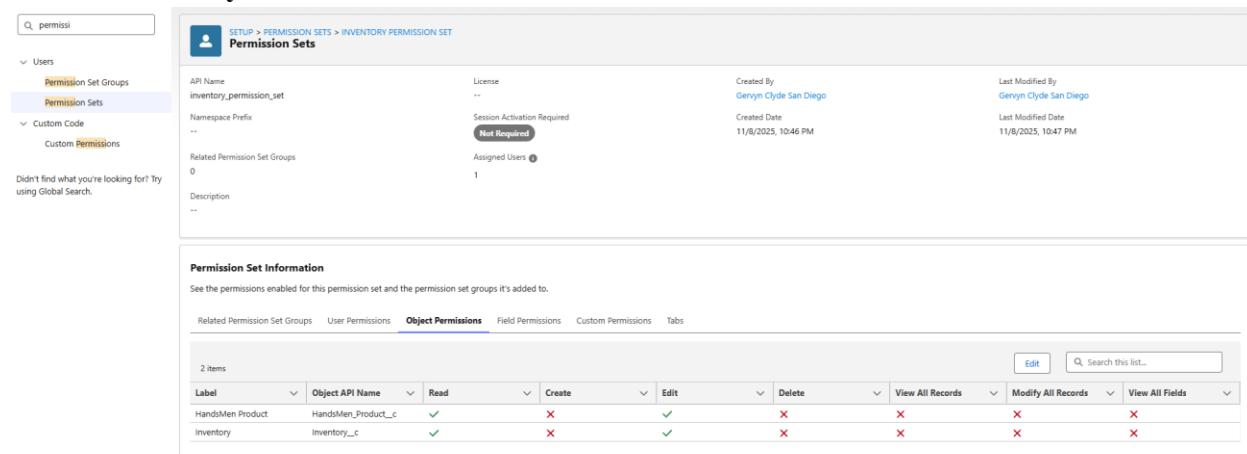
Related Permission Set Groups: 0
Assigned Users: 1
Description: --

Permission Set Information
See the permissions enabled for this permission set and the permission set groups it's added to.

Object Permissions tab is selected. The table shows permissions for HandsMen Customer and HandsMen Order objects:

| Label | Object API Name | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields |
|-------------------|----------------------|------|--------|------|--------|------------------|--------------------|-----------------|
| HandsMen Customer | HandsMen_Customer__c | ✓ | ✓ | ✓ | ✓ | ✗ | ✗ | ✗ |
| HandsMen Order | HandsMen_Order__c | ✓ | ✓ | ✓ | ✓ | ✗ | ✗ | ✗ |

Inventory:



The screenshot shows the 'Permission Sets' page for the 'Inventory' permission set. The main details section includes:

| API Name | License | Created By | Last Modified By |
|--------------------------|-----------------------------|-----------------------|-----------------------|
| inventory_permission_set | -- | Genyn Clyde San Diego | Genyn Clyde San Diego |
| Namespace Prefix | Session Activation Required | Created Date | Last Modified Date |
| -- | Not Required | 11/8/2025, 10:46 PM | 11/8/2025, 10:47 PM |

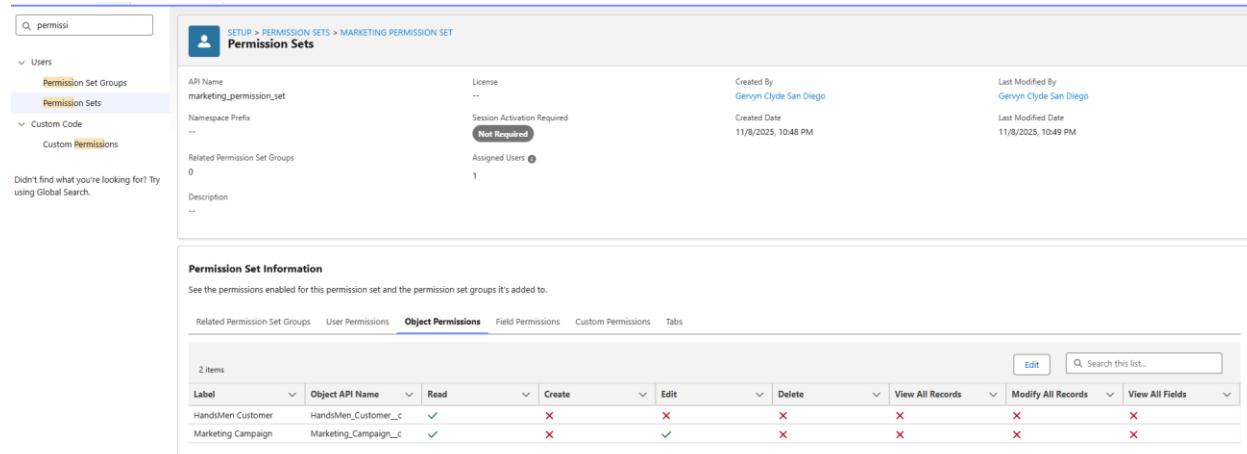
Related Permission Set Groups: 0
Assigned Users: 1
Description: --

Permission Set Information
See the permissions enabled for this permission set and the permission set groups it's added to.

Object Permissions tab is selected. The table shows permissions for HandsMen Product and Inventory objects:

| Label | Object API Name | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields |
|------------------|---------------------|------|--------|------|--------|------------------|--------------------|-----------------|
| HandsMen Product | HandsMen_Product__c | ✓ | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ |
| Inventory | Inventory__c | ✓ | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ |

Marketing:



The screenshot shows the 'Permission Sets' page for the 'Marketing' permission set. The main details section includes:

| API Name | License | Created By | Last Modified By |
|--------------------------|-----------------------------|-----------------------|-----------------------|
| marketing_permission_set | -- | Genyn Clyde San Diego | Genyn Clyde San Diego |
| Namespace Prefix | Session Activation Required | Created Date | Last Modified Date |
| -- | Not Required | 11/8/2025, 10:48 PM | 11/8/2025, 10:49 PM |

Related Permission Set Groups: 0
Assigned Users: 1
Description: --

Permission Set Information
See the permissions enabled for this permission set and the permission set groups it's added to.

Object Permissions tab is selected. The table shows permissions for HandsMen Customer and Marketing Campaign objects:

| Label | Object API Name | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields |
|--------------------|-----------------------|------|--------|------|--------|------------------|--------------------|-----------------|
| HandsMen Customer | HandsMen_Customer__c | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Marketing Campaign | Marketing_Campaign__c | ✓ | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ |

Testing

Test cases include:

- Creating orders
- Error messages from validation rules
- Flows sending emails
- Apex triggers working correctly
- Loyalty updating

Screenshots:

The screenshot shows a Salesforce interface for managing inventory. The top navigation bar includes links for HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, **Inventory**, Marketing Campaigns, Reports, and Dashboards. The main content area is titled "Inventory" and displays item "I -0001". Below the title, there are two tabs: "Related" and "Details", with "Details" being the active tab. The "Details" section contains the following fields and their values:

- Inventory Number: I -0001
- HandsMen Product: shorts
- Stock Quantity: 598
- Stock Status: Available
- Warehouse: (empty)
- Created By: Gervyn Clyde San Diego, 11/8/2025, 10:28 PM
- Last Modified By: Gervyn Clyde San Diego, 11/18/2025, 1:02 AM

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventory

Marketing Campaigns

Reports

Dashboards

Acc

HandsMen Order O-0007

Owner Gervyn Clyde San Diego

Details

HandsMen OrderNumber O-0007

HandsMen Product shorts

HandsMen Customer john

Status Confirmed

Quantity 100

Total Amount 300

Customer Email clydesantos1209@gmail.com

Created By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM

Last Modified By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM

Inventory I-0001

Details

Inventory Number I-0001

HandsMen Product shorts

Stock Quantity 498

Stock Status Available

Warehouse

Created By Gervyn Clyde San Diego, 11/8/2025, 10:28 PM

Last Modified By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM

HandsMen Customer john

Related Details

HandsMen Customer Name john

Email clydesantos1209@gmail.com

Phone

Loyalty Status Bronze

FirstName john

LastName Doe

FullName john Doe

Total Purchases 400

Created By Gervyn Clyde San Diego, 11/8/2025, 10:27 PM

HandsMen Customer john

Related Details

HandsMen Customer Name john

Email clydesantos1209@gmail.com

Phone

Loyalty Status Silver

FirstName john

LastName Doe

FullName john Doe

Total Purchases 800

Created By Gervyn Clyde San Diego, 11/8/2025, 10:27 PM

in:spam

Your Order has been Confirmed! [Spam](#)

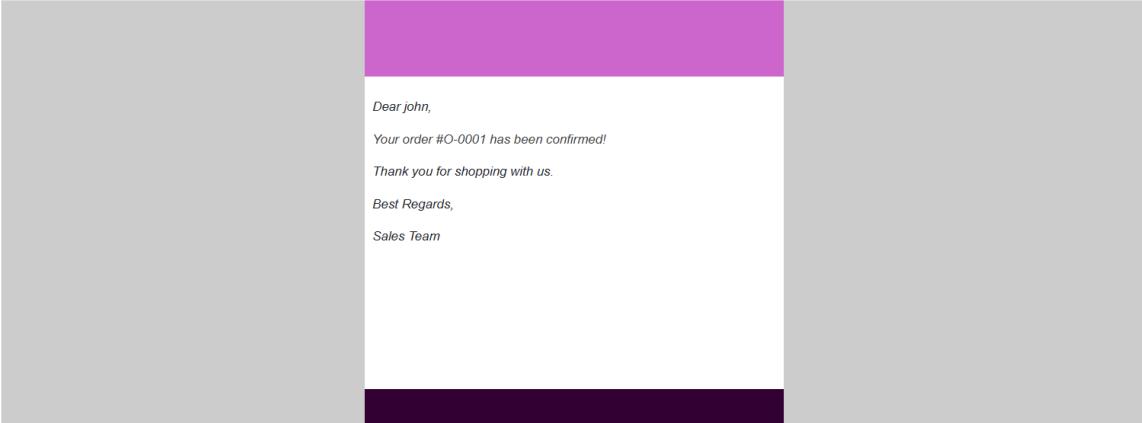
Gervyn Clyde San Diego via pztkucjbvndpwz.g5-18z8aeau.ind168.bnc.salesforce.com
to me ▾

Sun, Nov 9, 3:20 PM (9 days ago) [Star](#) [Reply](#) [Forward](#) [More](#)

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

[Report not spam](#)

Dear john,
Your order #O-0001 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team



...

Delete forever | Not spam | [Email](#) [File](#) [More](#)

5 of 6

Low Stock Alert Email [Spam](#)

Gervyn Clyde San Diego via 6lx0fegpkzu67v.g5-18z8aeau.ind168.bnc.salesforce.com
to me ▾

Sun, Nov 9, 3:22 PM (9 days ago) [Star](#) [Reply](#) [Forward](#) [More](#)

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: shorts
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

[Reply](#) [Forward](#) [More](#)

Order:

New HandsMen Order

* = Required Information

Information

| | |
|----------------------|------------------------|
| HandsMen OrderNumber | Owner |
| HandsMen Product | Gervyn Clyde San Diego |
| HandsMen Customer | john |
| Status | Pending |
| Quantity | 2 |
| Total Amount | 0 |

Please Enter Correct Amount

*Customer Email: clydesantos1209@gmail.com

We hit a snag.

Review the following fields

- Total Amount

Customer:

New HandsMen Customer

* = Required Information

Information

| | |
|--------------------------|------------------------|
| * HandsMen Customer Name | Owner |
| Jane | Gervyn Clyde San Diego |
| Email | jabakn@jkdc.com |
| Phone | |
| Loyalty Status | --None-- |
| FirstName | jane |
| LastName | Doe |
| Total Purchases | |

We hit a snag.

Review the errors on this page.

- Please fill Correct Gmail

Inventory:

Inventory I -0001

Details

| | |
|------------------------------------|---|
| Inventory Number | I -0001 |
| HandsMen Product | shorts |
| Stock Quantity | 0 |
| Stock Status | Available |
| This field is calculated upon save | |
| Warehouse | |
| Created By | Gervyn Clyde San Diego, 11/8/2025, 10:28 PM |

We hit a snag.

Review the errors on this page.

- the inventory count is never less than zero

PHASE 5: Deployment, Documentation & Maintenance

- | Deployment | Maintenance |
|--|---|
| <ul style="list-style-type: none">● Used Change Sets● Validated components● Tested everything after deployment | <ul style="list-style-type: none">● Monitor using Debug Logs● Review flow performance● Optimize Apex and automation● Backup data monthly |

Troubleshooting Tips

- Check debug logs
- Confirm user permissions
- Check if flows failed
- Check Apex governor limits

Conclusion

The Salesforce system for HandsMen Threads improves customer service, order handling, inventory updates, and promotions. Data is structured, automation is working, and the interface is easy to use. This system supports the company's growth and provides a smooth digital process for the premium fashion business.

Future Enhancements

- AI-based outfit suggestions
- Chatbot for customer questions
- Predictive stock updates
- Points-based loyalty rewards
- Advanced reports with Einstein Analytics